Product Documentation

Peregrine

AssetCenter

Product Review Guide

Part No. DAC-441-EN34

Peregrine SYSTEMS®

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AssetCenter

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Introduction

Purpose of this guide

The purpose of this guide is to give someone with no prior knowledge of AssetCenter, an overview of some of the common tasks that can be performed with specific focus on the **Asset Tracking**) and **Expense Control** processes.

After reading this guide, the reviewer will have a clear understanding of many of the key advantages of using AssetCenter.

Who should use this guide?

This guide is targeted to those trying to understand the potential advantages of using AssetCenter. This guide aims to provide answers that are:

- **Direct**: You are not required to install or use AssetCenter
- **Comprehensive**: An **executive** presentation and a **practical** demonstration of the Windows interface functionality are included

In particular, this concerns anyone who wishes to evaluate the potential of AssetCenter, such as:

- Journalists

- Industry experts
- Consultants

How to use this guide

Chapter Presentation of AssetCenter

This chapter addresses the following:

- An introduction to AssetCenter
- The key benefits of AssetCenter
- What solutions AssetCenter provides

Chapter Discovering AssetCenter

This chapter steps through the AssetCenter user interface.

Chapter Asset Tracking

This chapter presents the key functions of the **Asset Tracking** solution.

Chapter Expense Control

This chapter presents the key functions of the **Expense Control** solution.

CHAPTER 1 Presentation of AssetCenter

AssetCenter serves as the consolidated asset information hub, providing a complete lifecycle view of the assets.

This encompasses:

- The relationship between the people, places, and assets within the organization
- The services provided for those assets
- The compliance, contractual, and budgeting requirements for each asset
- The logistical and financial relationship of the MSPs that contract with the organization

Peregrine's Asset Management solutions enable enterprises to transform previously isolated asset tracking tasks and activities into strategic corporate disciplines.

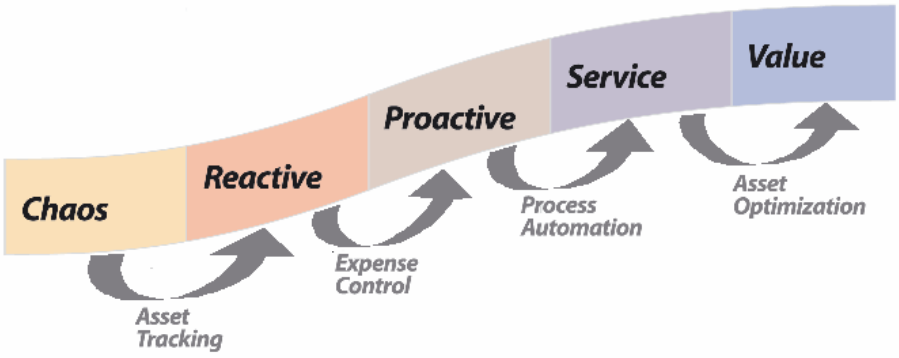
The organization is then able to actively manage its asset portfolio and associated fiscal and operational characteristics, in line with business objectives.

The result is a cost-efficient and enlightened organization, operating consistently within corporate policy and in compliance with regulatory requirements.

Peregrine's approach to the market

Peregrine believes that the best way to ensure our customers' success is to take an evolutionary approach to Asset Management within each organization.

Through this approach, organizations are able to mature at their own pace by identifying quantifiable milestones and accomplishments that in turn enable further proof points to help adopt and extend Asset Management principles and practices.



Asset Tracking

The first step in Asset Management is for an organization to implement an **Asset Tracking** procedure. This will answer the fundamental questions - "What assets do I have, where are they located, and who is using them?".

By creating a consolidated asset tracking system, organizations are better able to reduce costs associated with supporting the corporate infrastructure and maverick buying while improving infrastructure security by tracking employee access to sensitive assets.

Expense Control

Once Asset Tracking is in place, the second step for an organization is to adopt **Expense Controls**. At this stage it is important to associate financial and contractual information with each asset.

This in turn enables the organization to reduce the risks associated with compliance and regulatory issues, while optimizing the negotiated contracts of assets.

It is here that software license compliance and lease management are implemented.

Process Automation

Now that all assets are physically tracked and financially scrutinized, it is time to further integrate Asset Management across the organization.

Through **Process Automation**, Asset Management is extended to work seamlessly with other business practices, such as service management and procurement.

It is also at this stage of Asset Management that IT can track expenses directly against the lines of business.

The result is a more automated Asset Management practice that increases business process efficiencies while ensuring consistency and accuracy of practices across functional disciplines.

Asset Optimization

The final stage in a company's Asset Management evolution is the **Optimization** of the environment.

Optimization involves the adoption of business intelligence and advanced analytics to identify trends and opportunities for improvement.

Through optimization, the organization can fully articulate the fiscal performance of IT and chargeback as appropriate to the business units who consume its services.

The goal is to improve and extend asset management such that the costs to maintain the infrastructure decrease year over year.

AssetCenter overview

AssetCenter is a comprehensive solution that enables organizations to control costs and reduce complexity through end-to-end lifecycle asset management.

AssetCenter tracks and reconciles assets in a central repository, manages software license compliance and entitlement, controls expenses through chargeback programs, manages request fulfillment, provides fiscal transparency into the costs of IT, and extends asset management best practices to all employees.

AssetCenter sets the standard for IT asset management (ITAM).

AssetCenter can be deployed modularly to meet specific business needs, and provides a foundation for ongoing management of the infrastructure.

While many organizations have some idea of their physical inventory, most of that data is scattered in spreadsheets, databases, and third-party tools.

AssetCenter provides out-of-the-box integration with leading discovery tools such as those from Microsoft and Tivoli. AssetCenter also integrates with Enterprise Resource Planning (ERP) systems, such as SAP, which provide information at a summary level in comparison with the granular asset information that AssetCenter tracks.

AssetCenter has a built-in reconciliation engine that alerts administrators to user defined changes in asset data, personnel data, and catalog items that if unchecked, would erode the accuracy of the asset repository.

The following modules are available as part of the AssetCenter suite:

Portfolio

AssetCenter Portfolio provides a central repository to integrate all asset data from multiple sources.

It is the entry point for effective asset management practices and is the cornerstone of asset tracking.

Using **AssetCenter Portfolio** with **Desktop Inventory**, **Network Discovery** or **Enterprise Discovery**, IT organizations can simplify asset tracking by consolidating assets into a single repository.

They also can begin to execute cost-control projects such as server consolidation and software rationalization.

Business units can share utilization and allocate costs correctly by taking advantage of the configuration options available in AssetCenter **Portfolio**.

Financials

AssetCenter Financials allows you to capture, monitor, and manage all costs associated with an asset, from the time it enters the organization until its retirement.

The **Financials** module enables IT organizations to implement invoicing and chargebacks to business units.

Contracts

AssetCenter Contracts provides organizations with the ability to proactively manage software license compliance.

Using a central repository of existing contracts, invoices that normally reside in filing cabinets can be associated with each software license agreement.

Once the contractual and expense data are collected, AssetCenter provides reconciliation reports from the physical inventory stored in AssetCenter.

Procurement

AssetCenter Procurement allows organizations to simplify and automate the request fulfillment process.

The **Procurement** module automates and streamlines the entire request lifecycle, from the time an asset is requested until it is fulfilled.

Requests are verified to ensure that they meet corporate approved standards by checking against a catalog of approved assets, and monitoring existing stock and budgets to fill the request through available stock or inventory.

AssetCenter Procurement enables users to generate purchase orders and reconciles those purchase orders against the assets received from the vendors.

Cable and Circuit

AssetCenter Cable and Circuit manages the physical network connectivity inside and outside of the organization's infrastructure, such as tracing the connection of a server's ports to its clients.

CHAPTER 2 Discovering AssetCenter

We are now going to present:

- The AssetCenter interface (▸ An intuitive interface [page 13])
- The key functions of the **Asset Tracking** solution (▸ Asset Tracking [page 17])
- The key functions of the **Expense Control** solution (▸ Expense Control [page 35])

We are going to create George Gilbert, IT manager, who requires executive information concerning:

- The status of his computer population
- Software compliance
- Its running costs

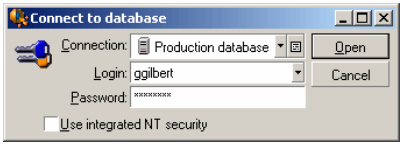
An intuitive interface

George Gilbert wishes to use an extremely simple interface to access the information he need; He does not require access to the full breadth of functionality in AssetCenter.

In a few clicks, George Gilbert displays a customized interface that is tailored to his individual usage of AssetCenter:

1 George Gilbert starts the AssetCenter Windows client using the **Start/ Programs/ Peregrine/ AssetCenter/ Peregrine AssetCenter** menu in Windows.

2 George Gilbert connects to the production database using his login and password:



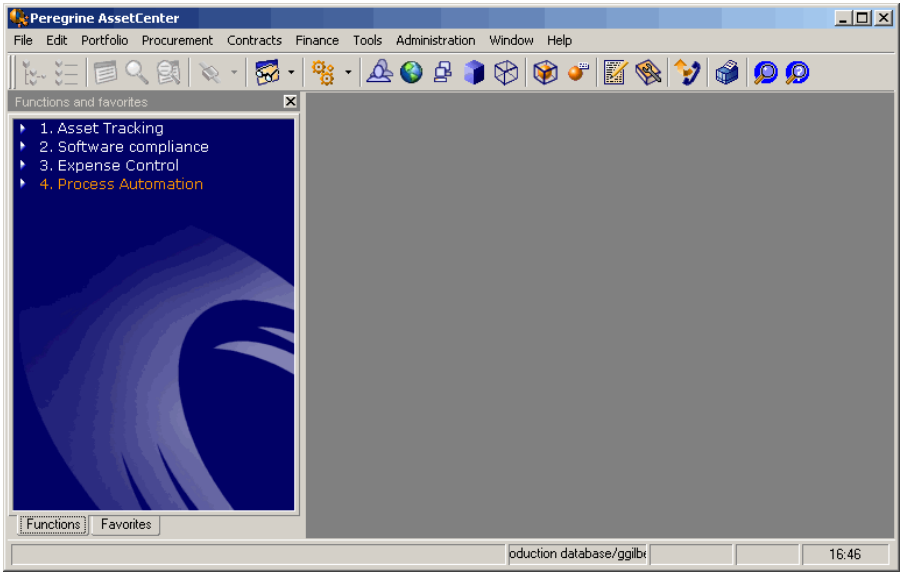
The password associated with the login, **ggilbert**, is **ggilbert**.

Note:

You will notice that database access is fully secured.

Users connecting to the database only have access to those parts of the software to which they are authorized.

3 AssetCenter displays a workspace showing the functions frequently used by George Gilbert:



Note:

Voluntarily, a reduced selection of menus and icons is displayed.

4 Most of the time, George Gilbert will use the shortcuts in the **Functions and favorites** pane.

When he requires access to other functionality, he can do this using the standard icons and menu commands.

CHAPTER 3 Asset Tracking

The next two chapters will address the key functions of Asset Tracking and Expense Control. You are not required to install AssetCenter to follow along. Screen shots are provided to demonstrate the operations performed and the results obtained.

Reminders

▸ Asset Tracking [page 8].

Portfolio management

Using an inventory tool to inventory assets and software

The first step in asset management is the identification and tracking of the assets that exist in the enterprise. Traditionally, this was done through walk-around manual audits, where someone from IT would take a clipboard and write notes as to what assets existed and perhaps some description (i.e., IBM T40 laptop,

512MB RAM, etc). More common today is the use of automated inventory tools such as Peregrine Network Discovery and Peregrine Desktop Inventory.

These tools are used to analyze the networked assets such as servers, desktops, and printers and collect information on their technical characteristics and installed software.

This information is fed into AssetCenter and serves as the foundation for all other asset management processes.

It is common for customers to have multiple inventory tools, tracking different parts of the environment. For example, Microsoft SMS for desktops and Tivoli Inventory for servers. AssetCenter recognizes this, which is why it provides, in addition to Peregrine Desktop Inventory and Peregrine Network Discovery, integration with the other industry leading inventory solutions.

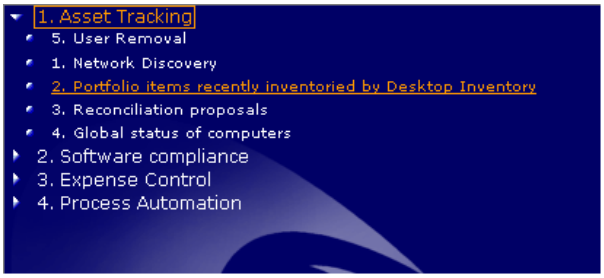
Once inventory has been created for the first time, it is critical for every subsequent inventory run that there be a process of reconciliation, whereby what has discovered is compared to what exists in the recorded inventory. Where discrepancies are identified, they must be reviewed to determine what changed and why. If changes were unauthorized or if the user is not entitled to something, the AssetCenter user can take corrective action. This prevents renegade hardware and software from entering the network, which in turn reduces the cost to support and maintain the assets.

In the following scenario, the Director of IT, George Gilbert, is using **Desktop Inventory** to automatically inventory all of the hardware and software, across all platforms.

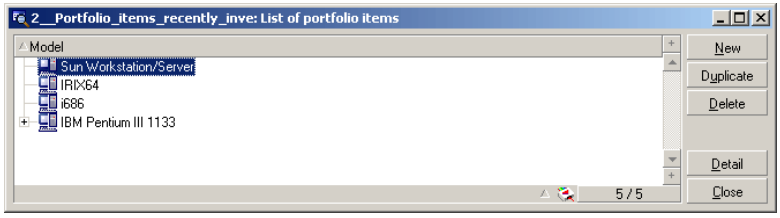
George needs to understand what assets are in the enterprise and where they are located. He is concerned about IT support costs and the security risks associated with unknown software. Additionally, he realizes that the organization can be held financially liable for the installation of unauthorized software.

For this, he regularly consults the list of recently inventoried portfolio items.

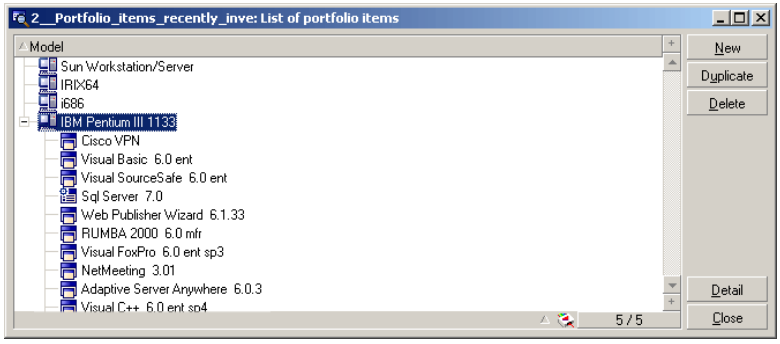
George Gilbert accesses the list of portfolio items inventoried recently, using the shortcut **2. Portfolio items recently inventoried by Desktop Inventory**:



AssetCenter displays the list of portfolio items recently inventoried by Desktop Inventory:

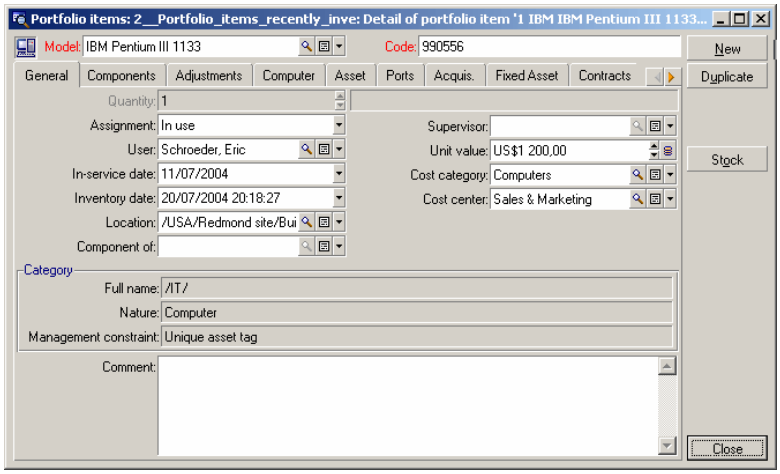


By clicking the + button, George Gilbert can view the components of the computer **IBM Pentium III 1133**:

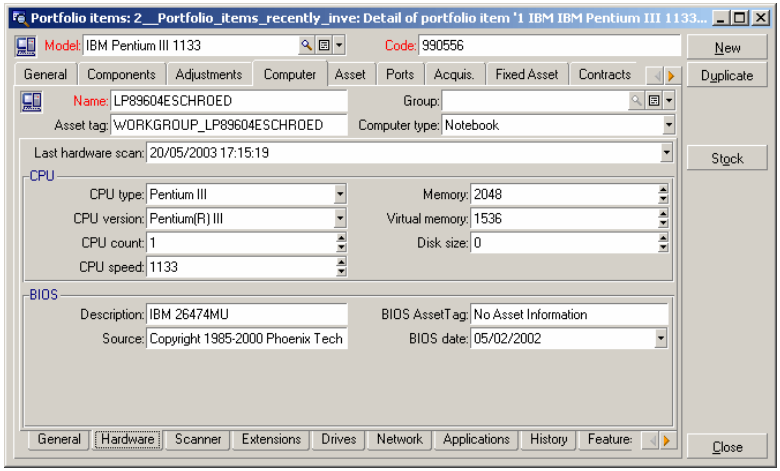


By clicking the Detail button, he can obtain more detailed information on the same computer. All the information gathered by Desktop Inventory is automatically imported into AssetCenter and is shown within tabs, such as:

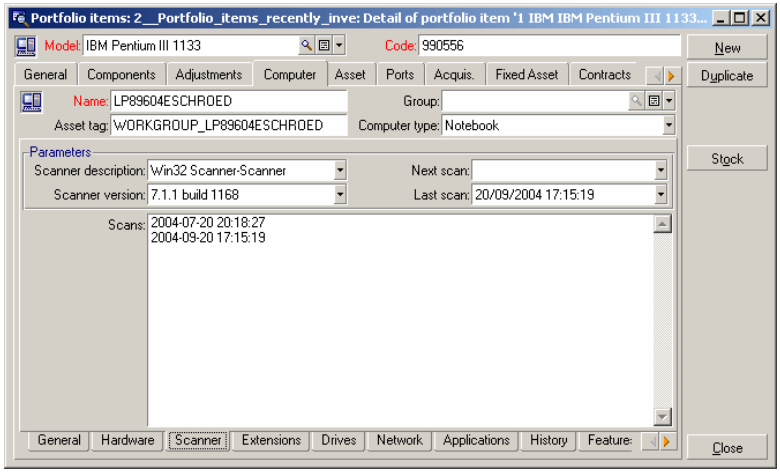
The **General** tab shows who uses the computer, where it is located, when it was installed, its unit value, and to what cost center (business unit, department, geography, etc) and cost category it is allocated:



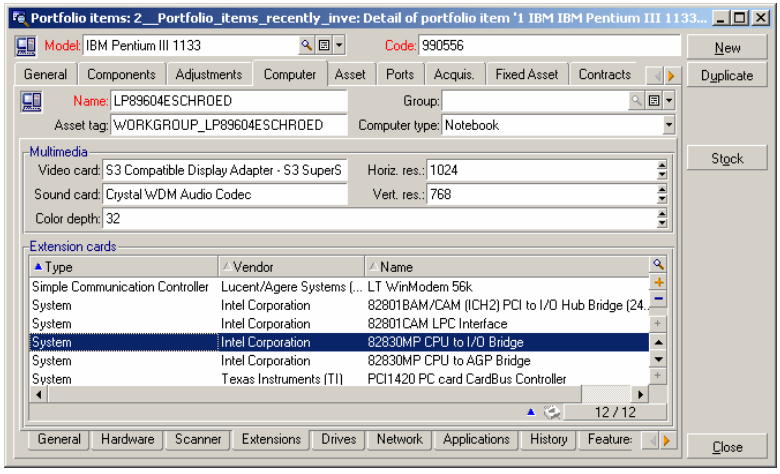
The **Hardware** tab shows the main technical details of the computer itself:



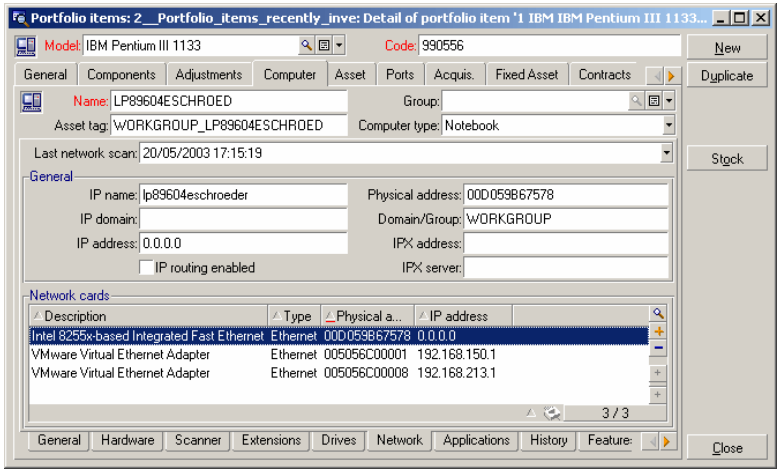
The **Scanner** tab specifies when the last inventory was conducted:



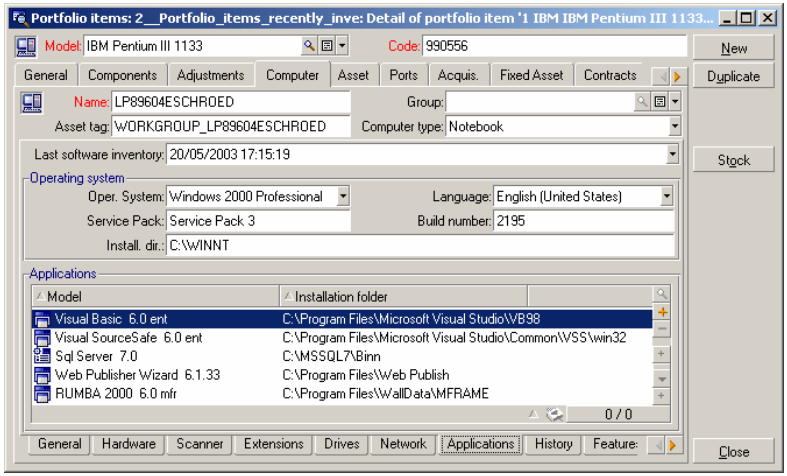
The **Extensions** tab specifies what extensions are installed on the computer, such as monitors, memory cards, modems, etc.:



The **Network** tab describes how the asset is connected to the network.:



The **Applications** tab presents the list of software applications installed on the computer:



Reconciling inventory data

As mentioned previously, the process of reconciliation is key for effective asset tracking. AssetCenter provides a unique Reconciliation Engine to enable IT to control the integrity and security of the asset repository.

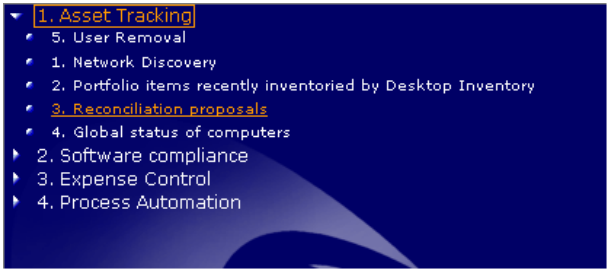
When an asset is imported into the AssetCenter database, the **Reconciliation** module verifies whether the asset already exists. If this is the case, no new record is created; the existing record is simply updated.

In order to ensure the record's integrity, AssetCenter allows for the definition of reconciliation rules: If a rule is not met, the modification is not made in the database; Instead, the Reconciliation Engine creates a reconciliation proposal for review.

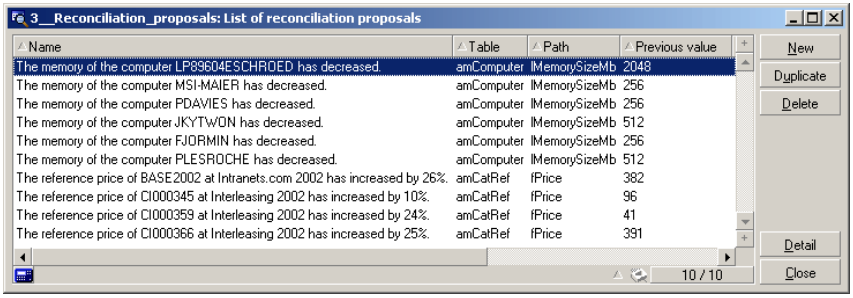
Example: Decreased computer memory.

1. The person in charge of processing the reconciliation proposals accesses the list.
2. They examine each reconciliation proposal before accepting it or rejecting it.

George Gilbert accesses the reconciliation proposals using the shortcut **3. Reconciliation proposals**:



AssetCenter displays the list of reconciliation proposals:

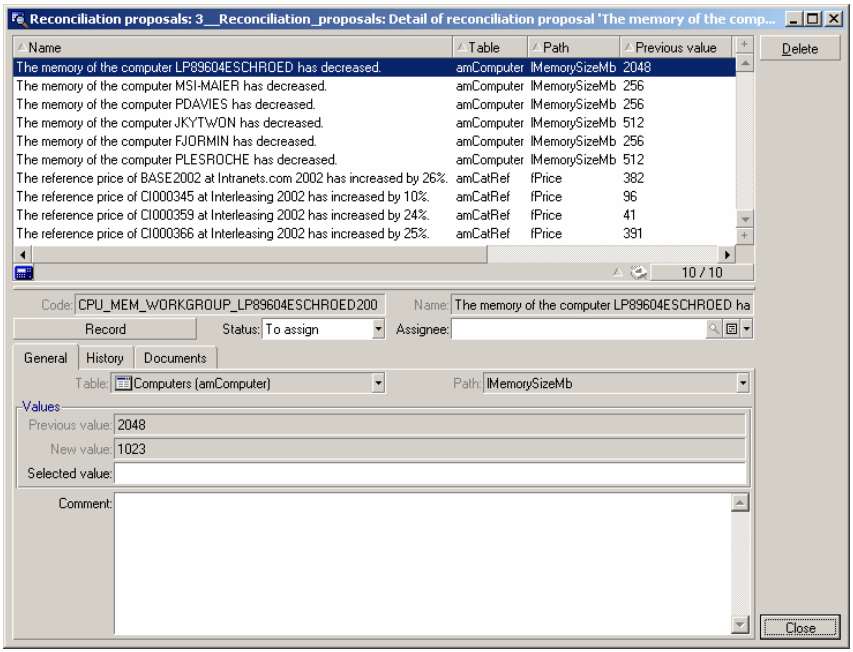


The previous list includes reconciliation proposals for computers whose memory has decreased.

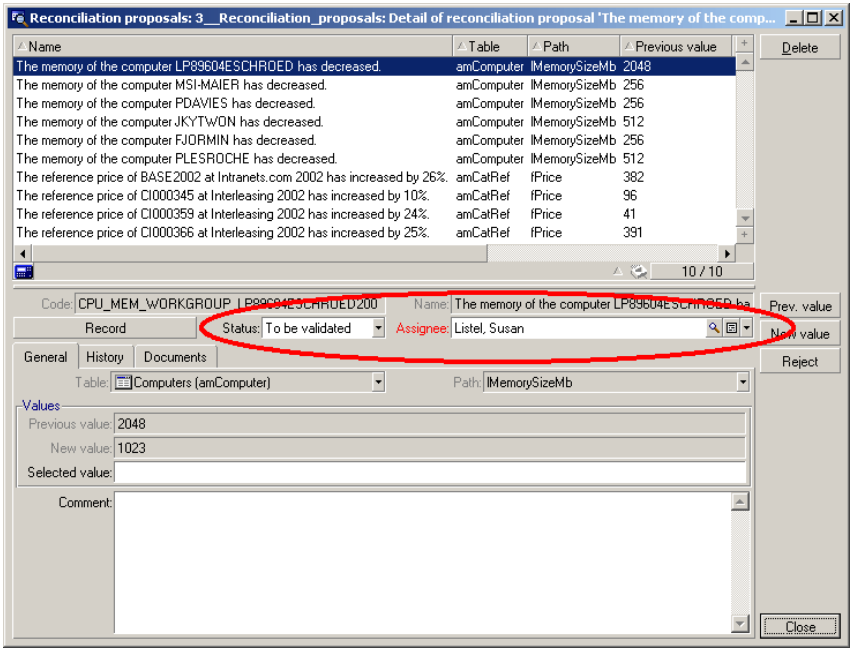
Note:

You will also notice reconciliation proposals for catalog references whose prices have decreased by 10% or more. The reconciliation module can be used import all kinds of data.

By selecting the reconciliation proposal and clicking the **Detail** button, George Gilbert displays the detail of the reconciliation proposal:



George Gilbert can then assign the proposal to someone to perform the required checks:



Once the assignee has checked the real amount of RAM on the computer, she can change the status of the reconciliation proposal to **Validated** or **Document rejected**.

Another example would be the unauthorized installation of Instant Messenger software. Using this exact same procedure as in the previous example, George would display the list of reconciliation proposals for computers where Instant Messenger was discovered.

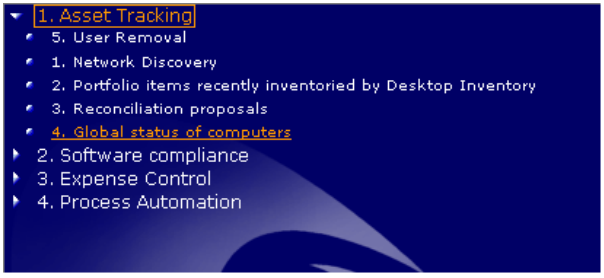
In our scenario, George could contact the users and instruct them that for security reasons, it is against company policy to install the Instant Messenger product. Not only may this avoid unforeseen support problems, it also prevents a potentially untraceable security hole that violates company policy or that may expose the company to financial risks.

Displaying executive information on the computer population

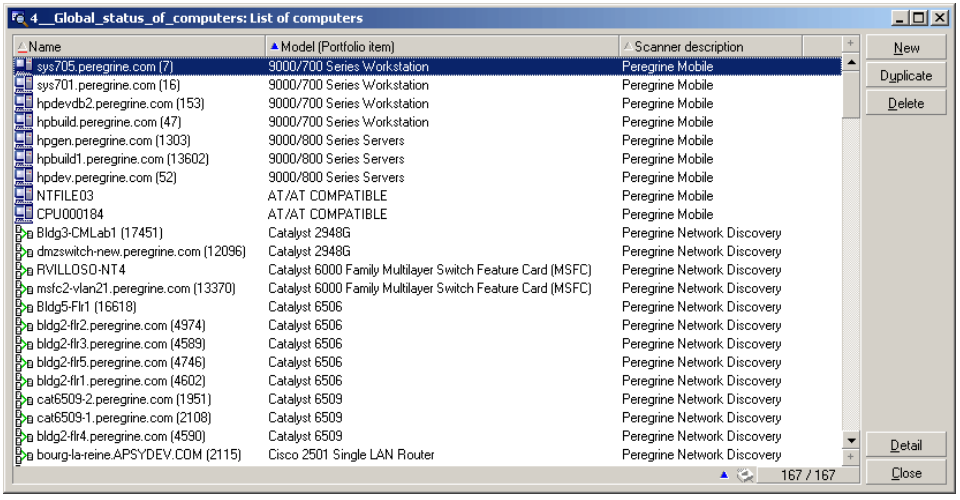
George Gilbert wants to know whether his computer population is homogeneous or not; This question is important because having a homogeneous computer population enables cost savings (simplified maintenance, better negotiated prices, etc.).

George Gilbert wishes to see a global view of the computer population.

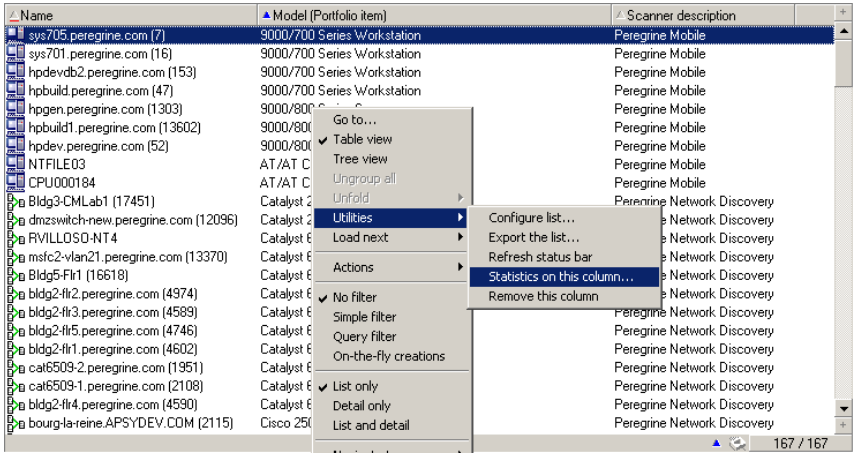
George Gilbert accesses the list of computers using the shortcut **4. Global status of computers**:



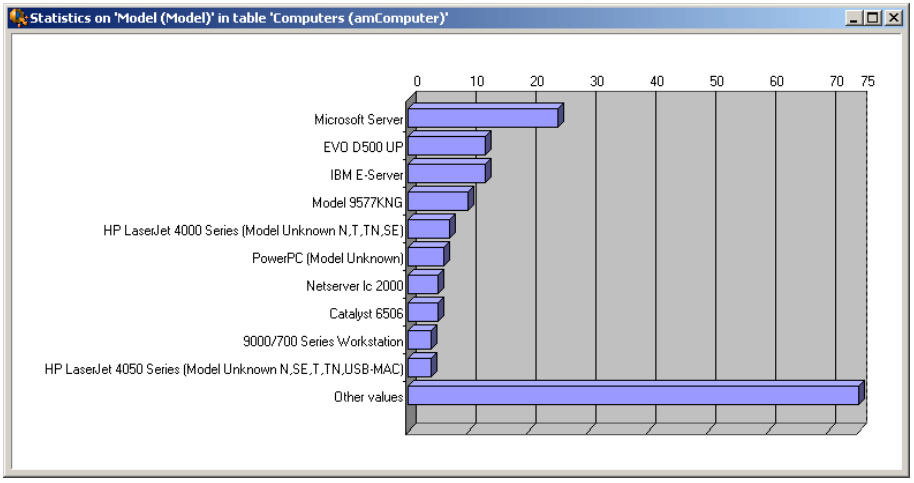
AssetCenter displays the list of computers:



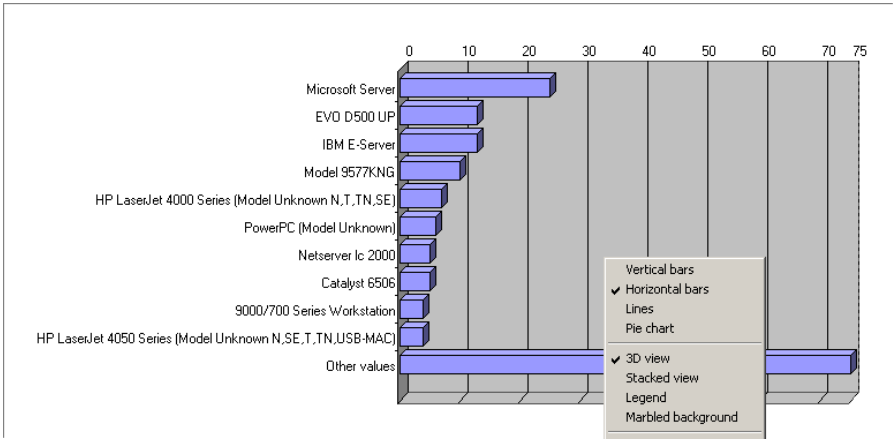
To see the breakdown of his computer population by model, he right clicks the **Model** column and then selects **Statistics on this column** from the shortcut menu:



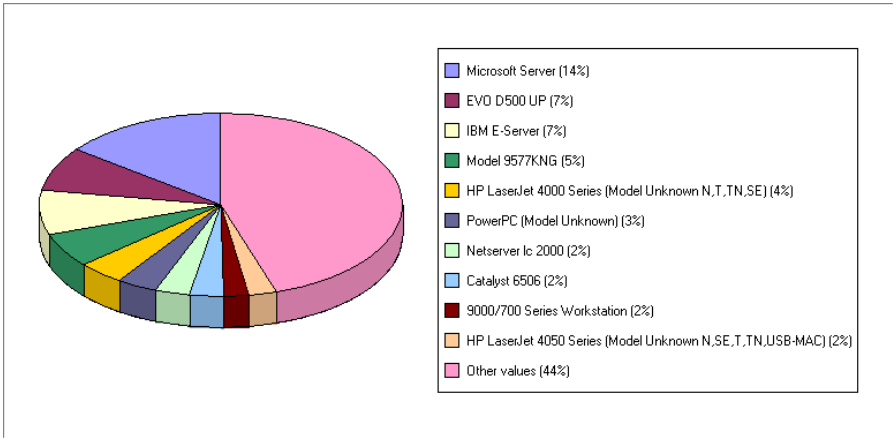
AssetCenter displays a chart showing the breakdown of computers:



By clicking the right button of the mouse, George Gilbert has several options as to how the chart is displayed:



By selecting the **Sectors** and **Key** options, George Gilbert can, for example, display a pie chart with a key:



George Gilbert can easily see that his computer population is not very homogeneous. He will soon start a program to correct this.

Managing a departing employee

Eric Wagner is leaving the company, and George Gilbert wants to update the database to ensure that he no longer has access to company systems and that the assets that were assigned to him can be used elsewhere. He will:

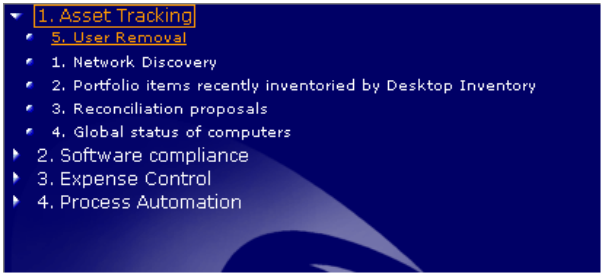
- Remove Eric Wagner from the department, cost center and cost category to which he was linked
- Erase the corresponding job title in the company
- Terminate his network user accounts
- Return his hardware assets to stock
- Free his software licenses

AssetCenter includes wizard functionality to automate this kind of task.

Tip:

AssetCenter ships with many out-of-the box wizards. Additionally, it is simple to create your own.

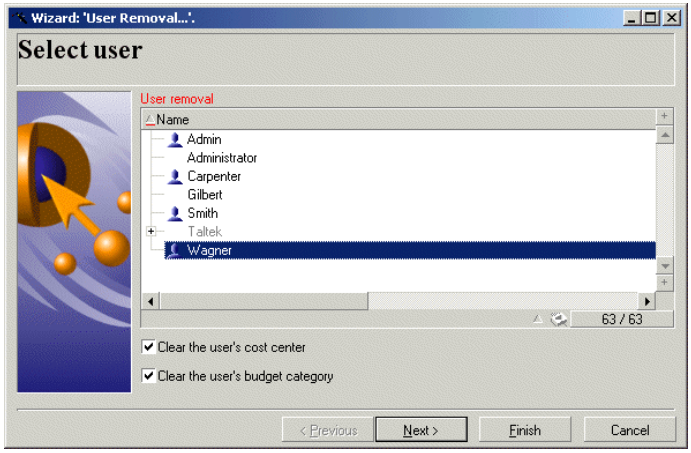
George Gilbert starts the wizard that will update the database using the **5. User Removal** shortcut:



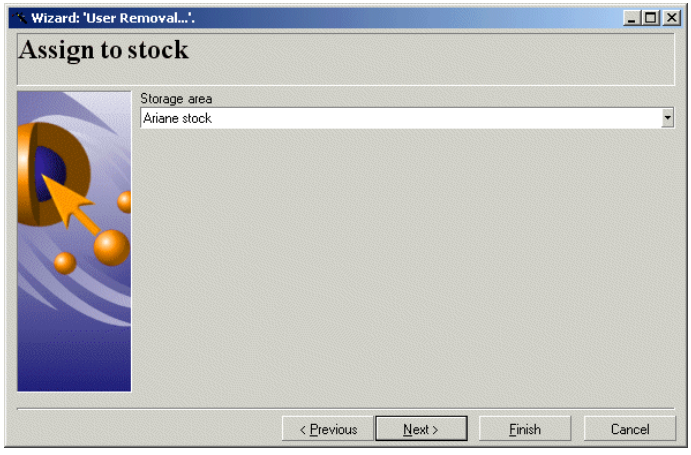
AssetCenter starts the wizard.

The wizard displays the following pages (George Gilbert can move through the pages using the **Next** button):

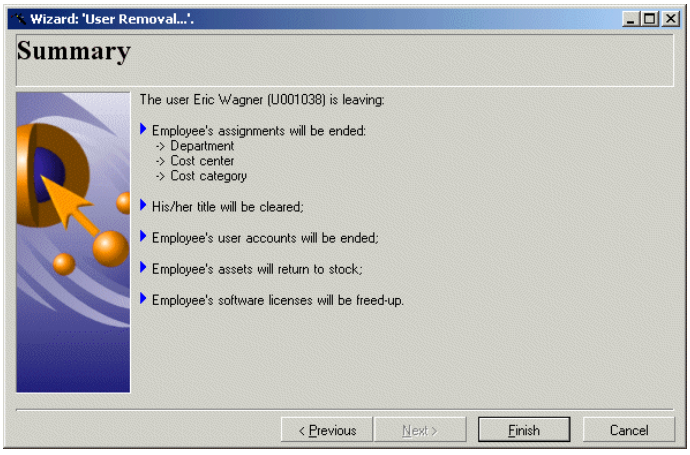
The **Select user** page to specify which employee is leaving the company:



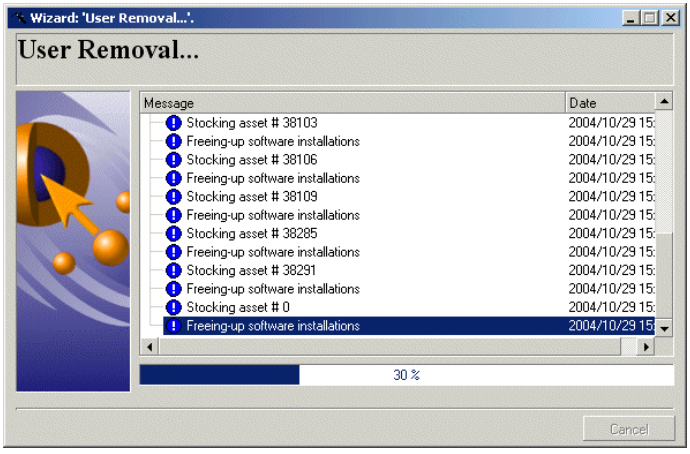
The **Assign to stock** page to specify which stock will receive the employee's assets:



The **Summary** page details the actions that the wizard will perform automatically (once you click **Finish**):



The **User removal** page logs all the actions that are automatically performed in the database:



Important:

Using AssetCenter, George Gilbert is is able to re-capture all assets allocated to Eric.

- Sensitive assets such as cell phones and BlackBerrys can be identified and reclaimed, avoiding unnecessary costs or security concerns.
- Assets are made available for use by others in the enterprise, which reduces costs by redeploying assets instead of purchasing new ones.
- Software license counts stay under control by reclaiming the license. Most organizations today attach a license to a specific machine and typically waste money by not reclaiming the license. Alternatively, IT may enter into enterprise license agreements to cover for the fact that there was no efficient process to count and reclaim licenses.
- The services to which Eric Wagner had access (cell phone air time, access to the safe, for example) are now denied: The enterprise is controls its costs and does not jeopardy its security.

CHAPTER 4 Expense Control

Reminders

▸ Expense Control [page 9].

Software management

Speaking of licences, George Gilbert has just been notified by the CFO that the company is being audited by one of its larger vendors for potential software compliance violations.

George Gilbert must assess the company's financial exposure.

He will look at the following:

- The license agreements and the rights conferred by these
- The software installations
- The number of installations versus the number of licenses
- The number of installations versus the number of users actually entitled to the software

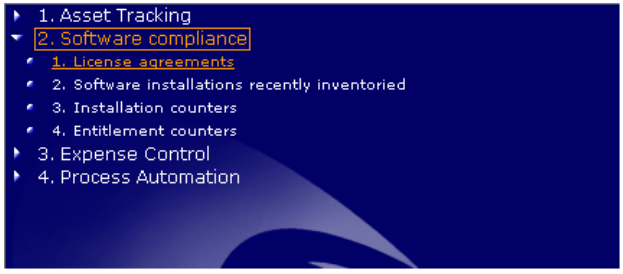
Following this, he will know which software products require additional licenses and whether the CFO needs to worry about financial exposure.

As an added benefit, George can identify which licenses are underutilized and are candidates for down-sizing.

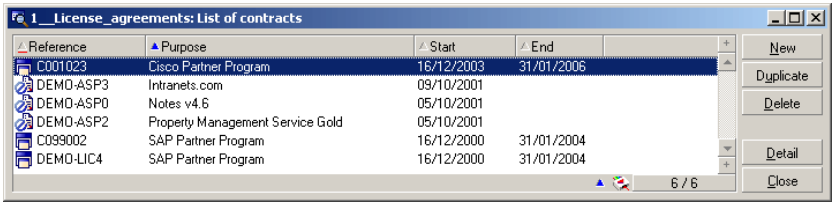
Managing license agreements

The first step for George Gilbert is to view his license agreements.

He accesses the list of license agreements using the shortcut **1. License agreements**:

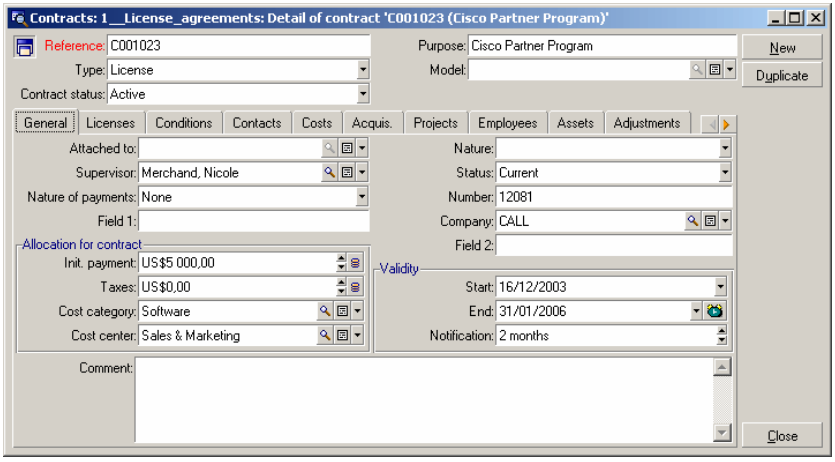


AssetCenter displays the list of license agreements:

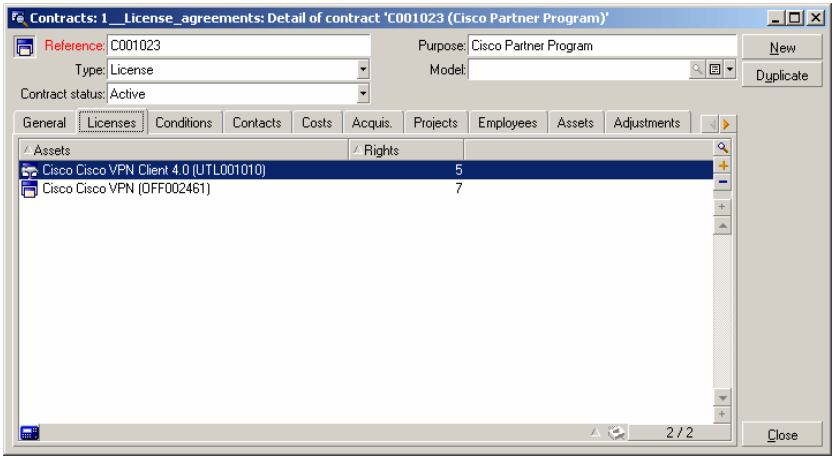


George Gilbert displays the detail of the **Cisco Partner Program** contract, and examines the information in the tabs.

The **General** tab contains the core information on the contract:



The **Licenses** tab lists the licenses that result from the contract and the number of rights for each license:



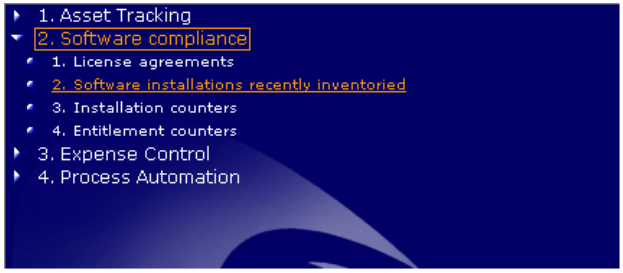
Note:

The number of rights will be reconciled with the number of installations or utilizations in order to check that the company is in compliance.

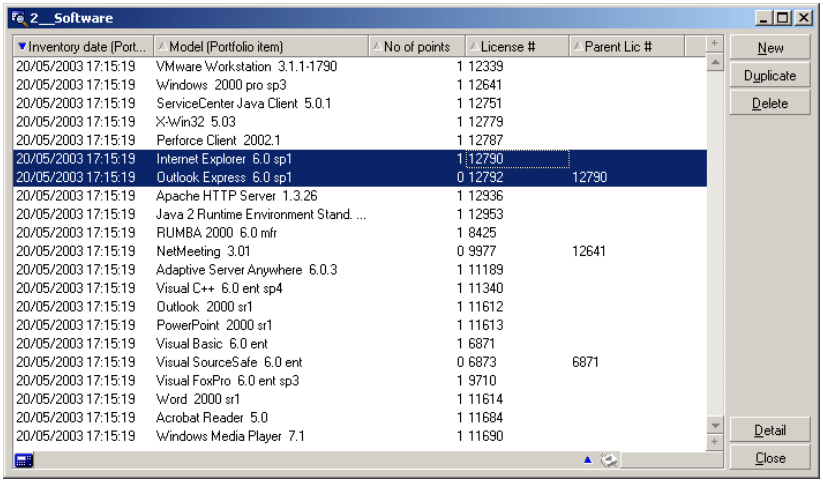
Viewing the lists of installed software on the computers

George Gilbert wishes to view the recently inventoried software installations.

He accesses the list of recently inventoried software installations using the shortcut **2. Software installations recently inventoried**:



AssetCenter displays the list of recent installations:



AssetCenter enables detailed analysis of the software installations. For example, when looking at the two installations selected in the previous screen he finds the following information:

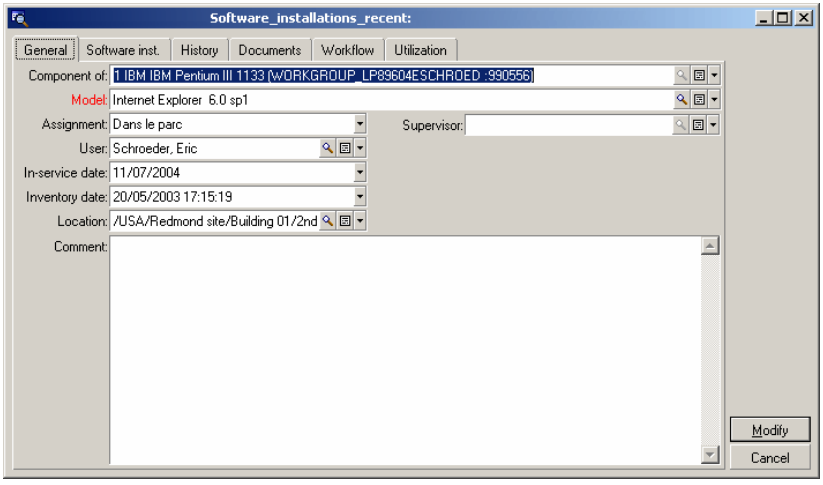
- Inventory date
- Software installed
- Number of license points used by the installation
- The license number

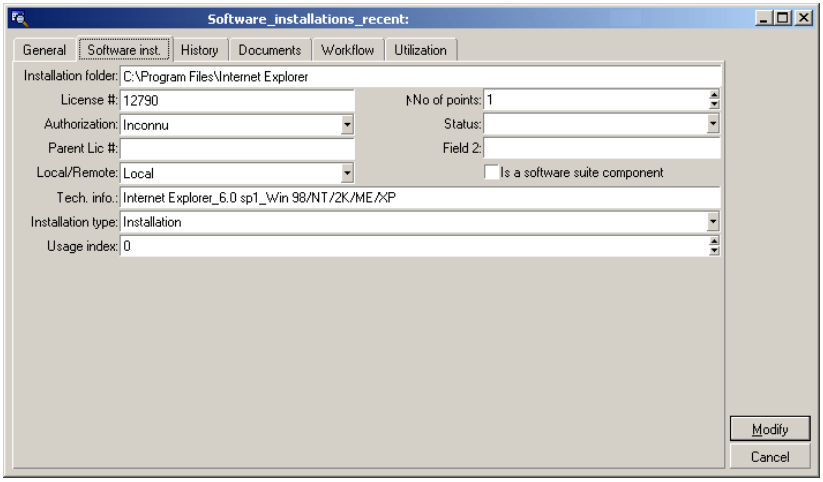
- You will notice that **Outlook Express** is part of the **Internet Explorer** package; AssetCenter It is specified that 1 license point is counted for **Internet Explorer** but not for **Outlook Express**.

Note:

The installation points will be reconciled with the license rights.

George Gilbert displays the **Internet Explorer** installation and displays the detail (**Detail** button), and then examines the tabs describing it:

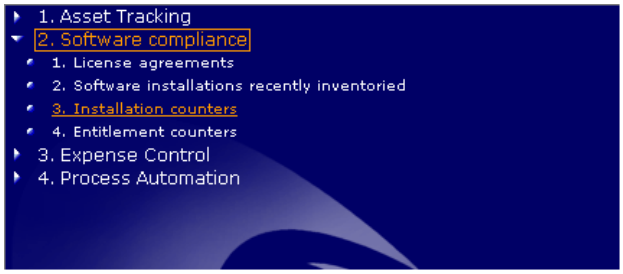




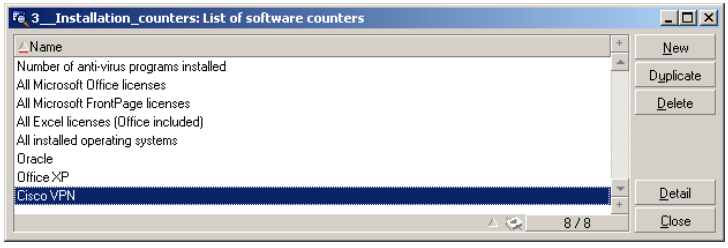
Verifying software compliance

George Gilbert wishes to check that software installations and utilizations are in compliance with the rights granted in the licenses.

He accesses the list of installation counters using the shortcut **3. Installation counters**:

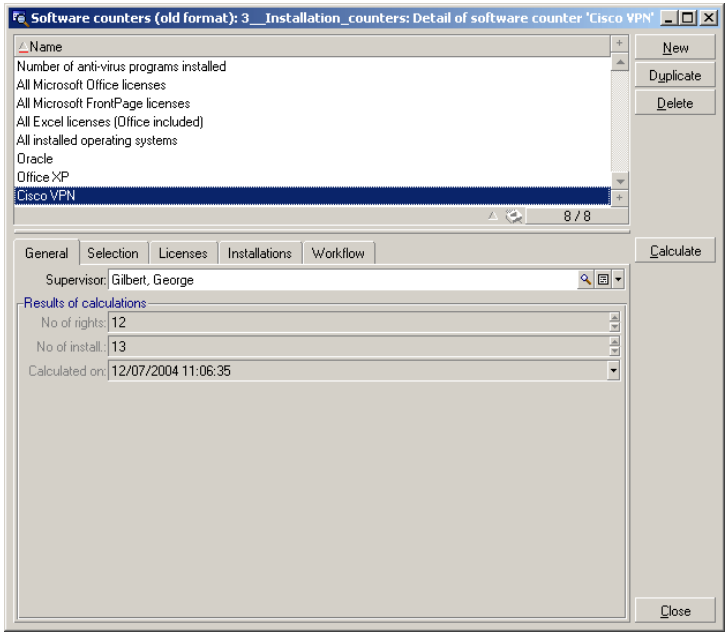


AssetCenter displays the list of counters:



George Gilbert displays the detail of the counter **Cisco VPN**.

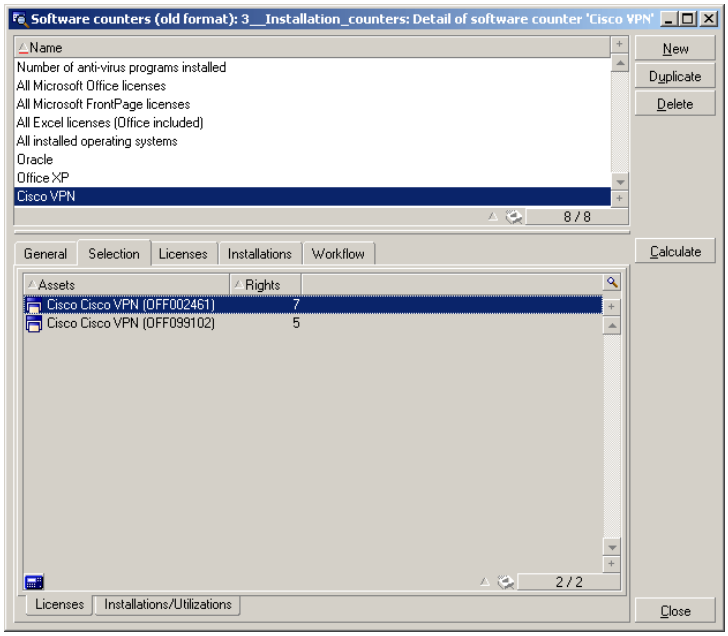
The detail tabs of the counter enable you to access the following information:



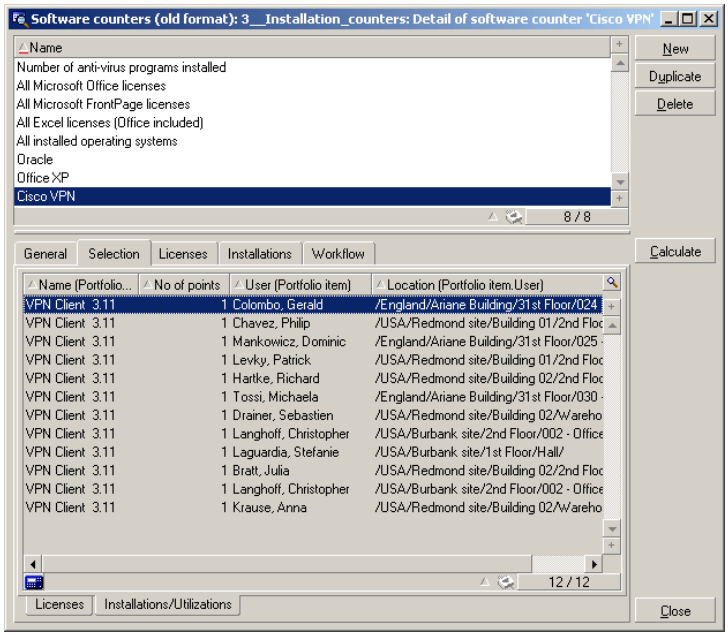
The **General** tab quickly shows that the **Cisco VPN** licenses give 12 rights, whereas 13 points are actually installed.

George Gilbert thus sees that the company is not in compliance for this license.

He displays the **Selection/ Licenses** tab in order take at look at how the license points have been accounted for:



He displays the **Selection/ Licenses** tab in order take at look at how the installation points have been accounted for:

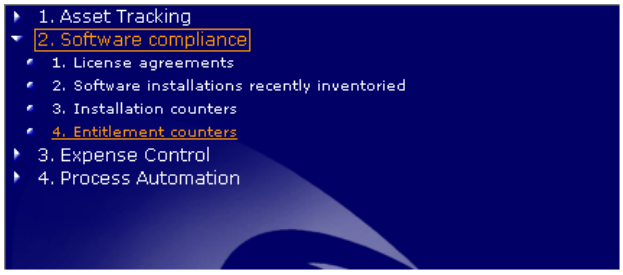


In this way, he can see who installed the software and where the users are located.

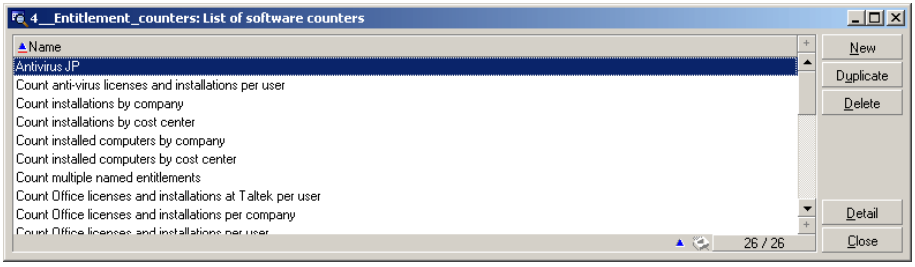
Verifying software entitlement compliance

George Gilbert wishes to check that software entitlements and utilizations are in compliance with the rights granted in the licenses.

He accesses the list of entitlement counters using the shortcut **4. Entitlement counters**:

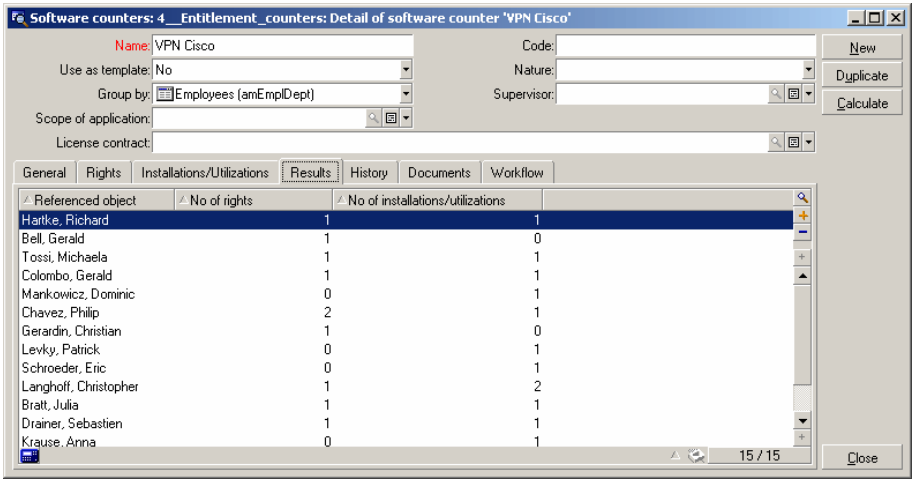


AssetCenter displays the list of entitlement counters:



George Gilbert displays the detail of the counter **Cisco VPN**.

The detail tabs of the counter enable you to access the following information:



He can thus see who the software entitlement belongs to versus who has the product installed.

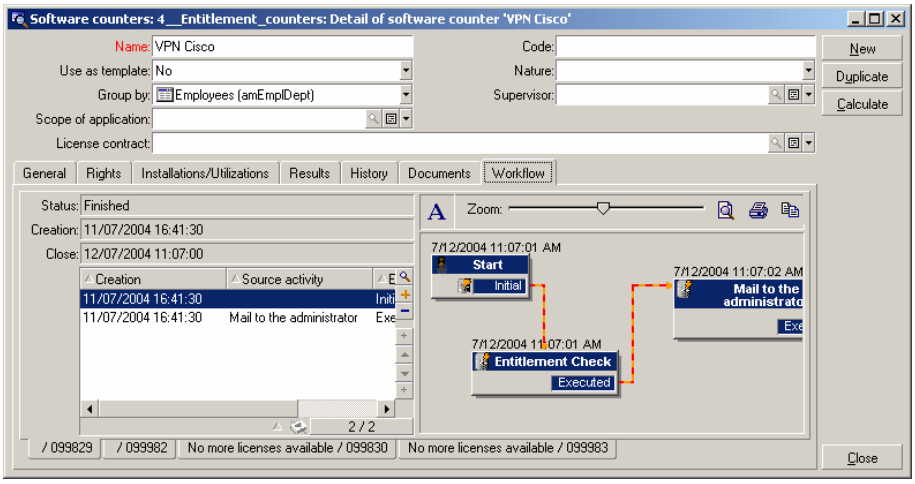
George Gilbert notices that certain users have installed the software without having the right to do so, and that other users are entitled to but have not installed the software.

George Gilbert must therefore contact the users to correct the situation either by expanding the number of licenses purchased or reallocating the software to the entitled parties.

Automatically notifying irregularities

AssetCenter's powerful workflow engine makes it possible to regularly check the status of software counters, and flag proactively potential issues.

For example, the workflow below notifies George Gilbert of potential compliance violations as shown by a counter:

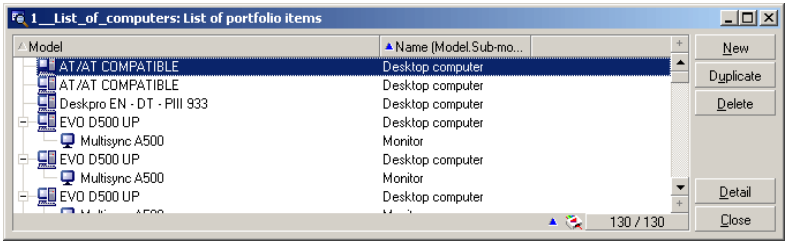


Consolidation opportunities

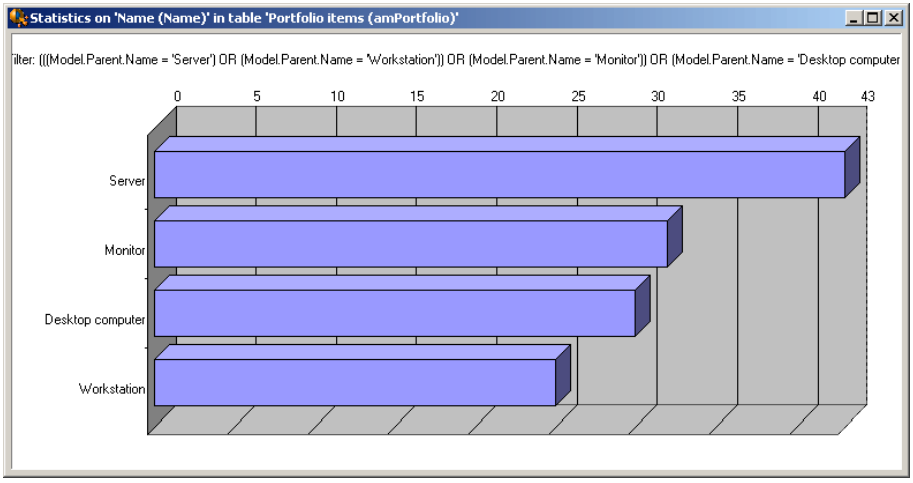
George has been asked to identify opportunities to reduce expenses. One idea has been to review potential opportunities to consolidate servers that may be fulfilling redundant processes. As George's company has grown via acquisition, there may be some opportunity for greater efficiencies.

George wishes to have an idea of the proportion of servers in his computer population. He accesses the list of computers using the shortcut **1. List of computers**:

AssetCenter displays the list of computers:

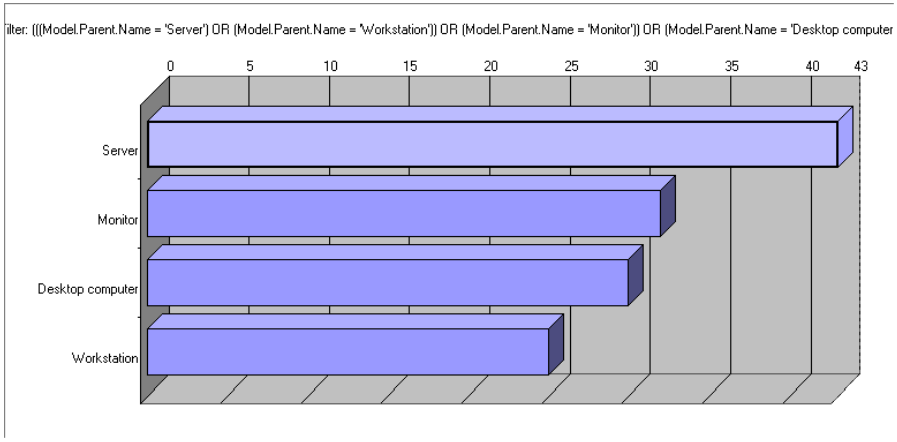


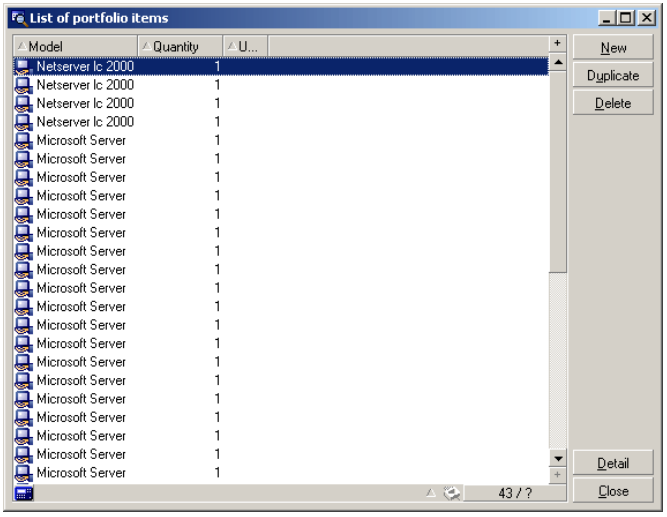
To find out the proportion of servers in the computer population, George Gilbert right clicks the **Model** column, and then selects the **Utilities/ Statistics on this column** from the shortcut menu thus displaying a chart:



Now he knows that servers account for 43% of the computers in his computer population.

He can click on the **Servers** bar in the chart directly to access the list of portfolio items that are included in the count:



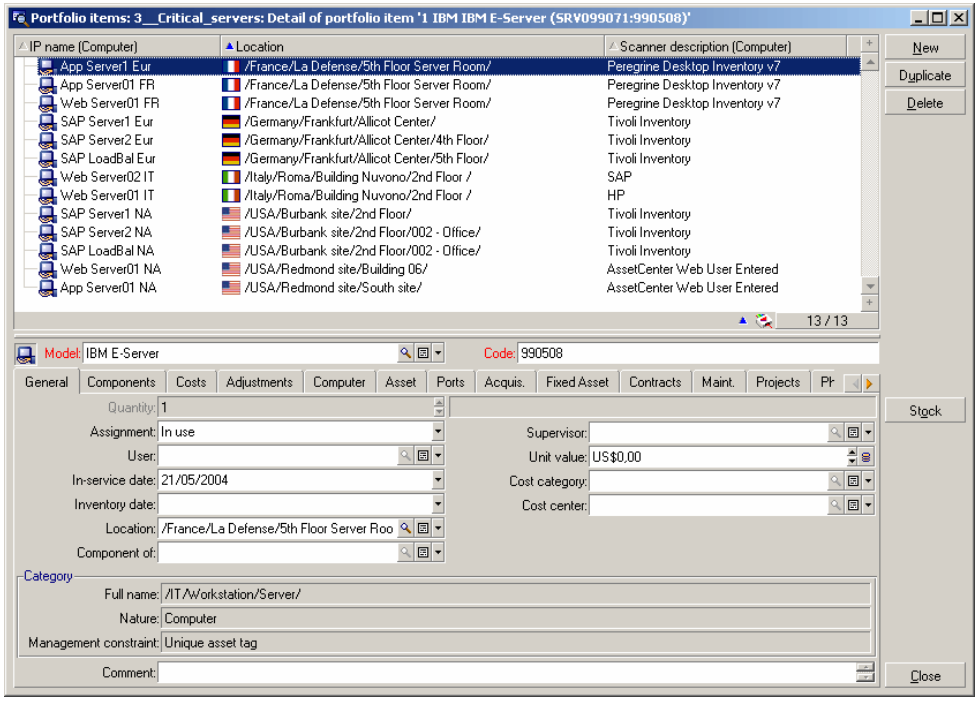


Viewing the critical servers

George has created a view to directly access what are considered mission critical.

He accesses this list by using the shortcut **1. Critical servers**:

AssetCenter displays the list of critical servers:



Using this list, he can have an overview of the locations of these servers.
He can also display the complete details of each server.

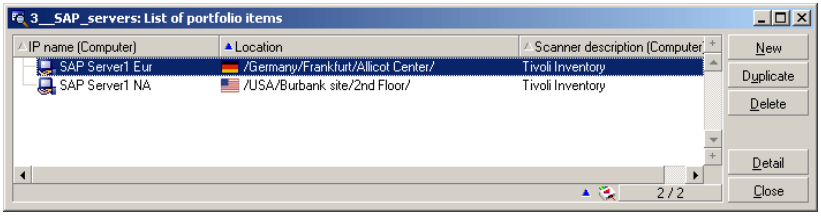
Comparing the performances of the SAP servers

George's company has recently acquired another company.

He knows that both companies were running SAP and are still on separate systems, and he has decided to evaluate which SAP configuration is more cost effective.

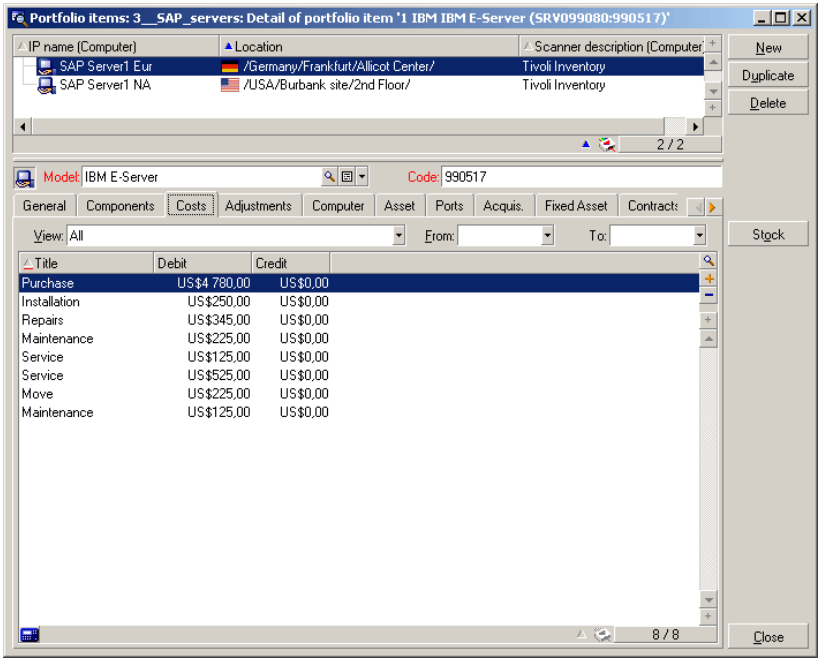
He accesses the list of SAP servers using the shortcut **3. SAP servers**:

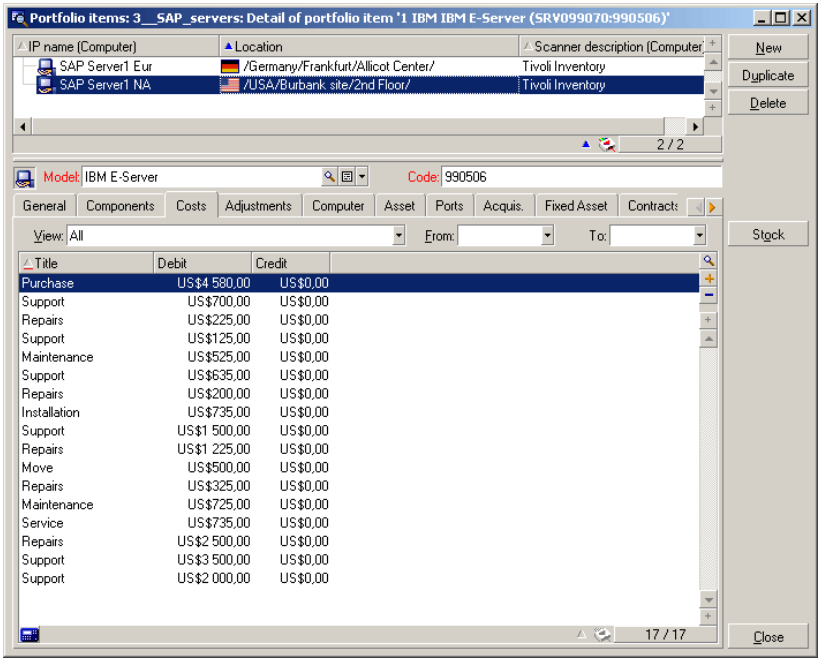
AssetCenter displays the list of SAP servers:



He can see one server located in Germany and another located in the United States.

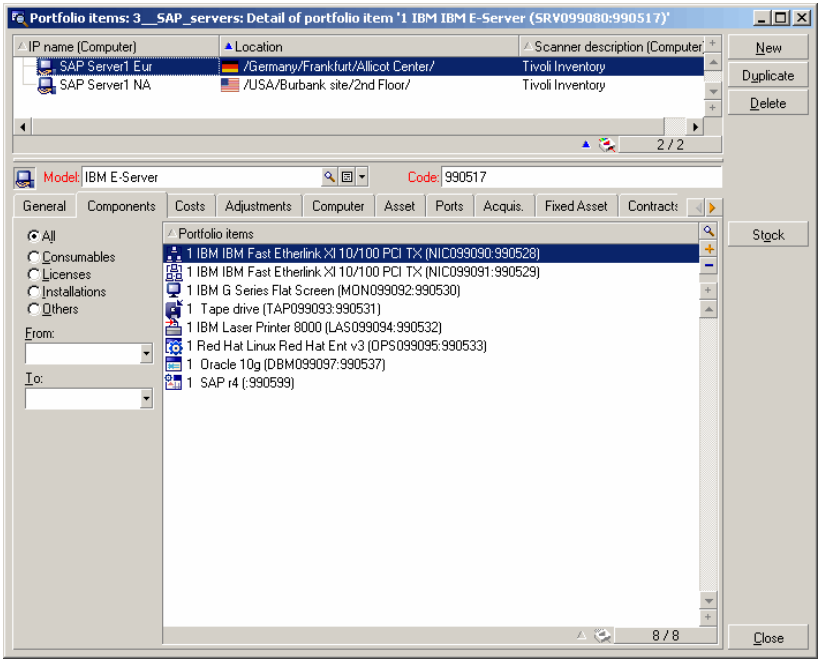
George Gilbert will start by comparing the costs of the two servers (he clicks the **Detail** button, and then alternates between selecting the German server and the US server):

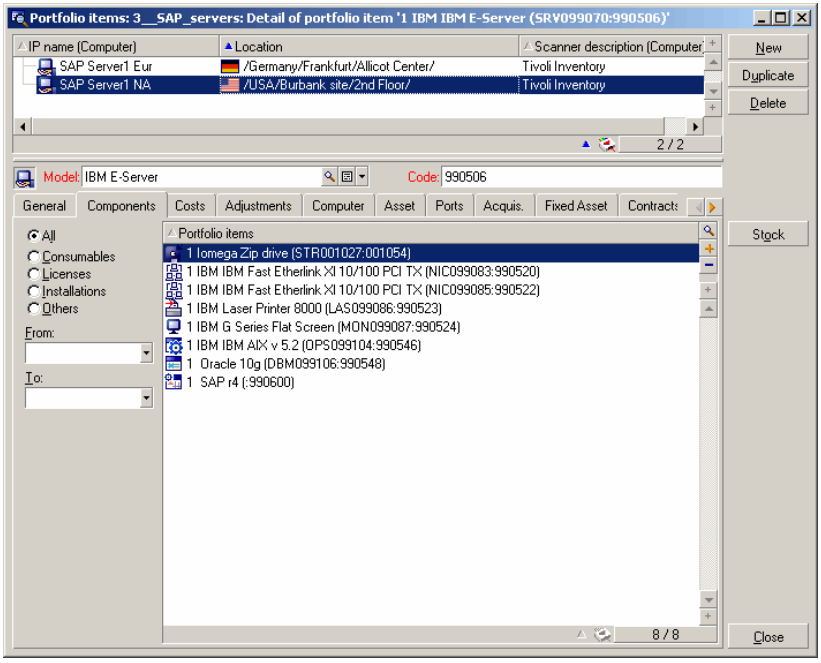




He notices that the US server has been more expensive than the German server.

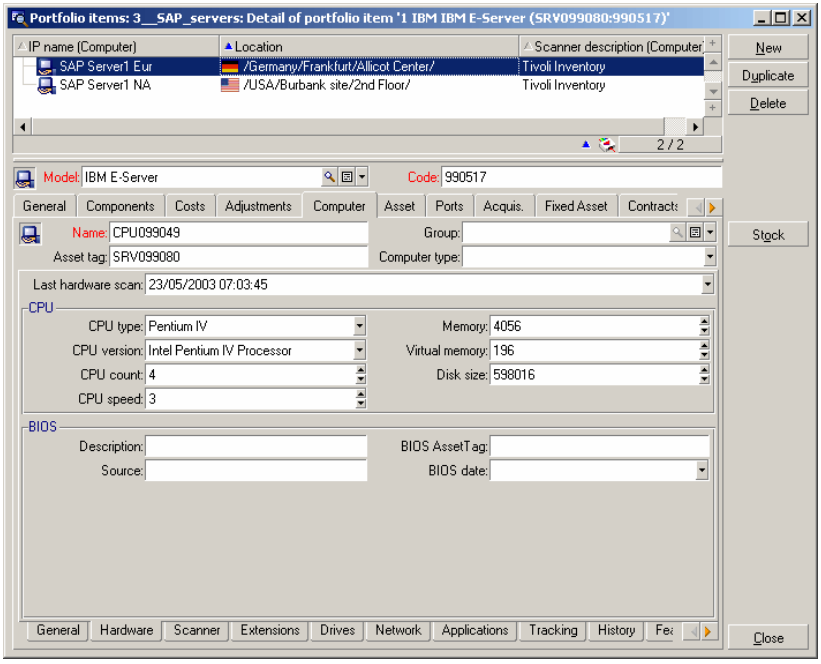
George Gilbert will now compare the architecture of the two servers:

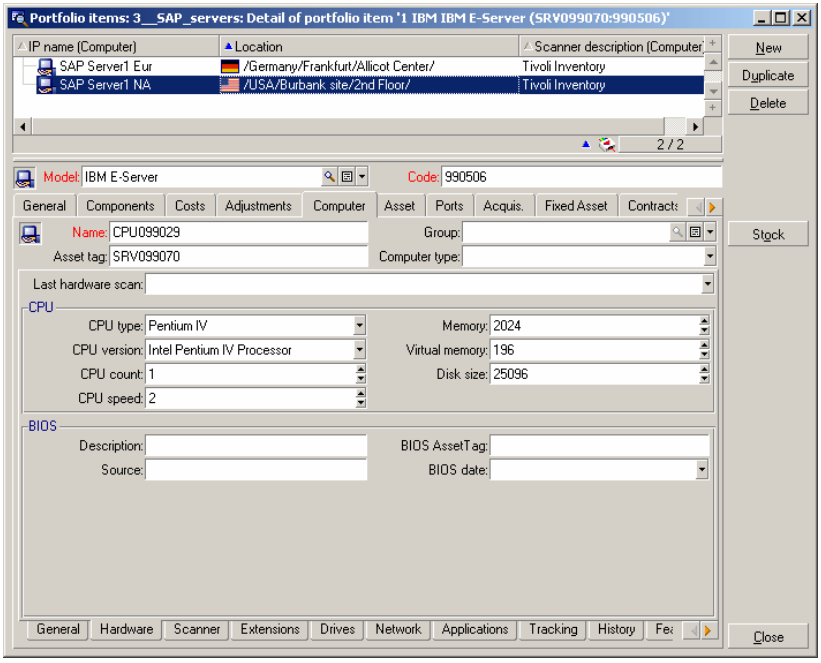




He notices that the German server is based on a **Red Hat Linux** computer running **Oracle** whereas the US server is based a computer running **Oracle** but is based on **IBM AIX**.

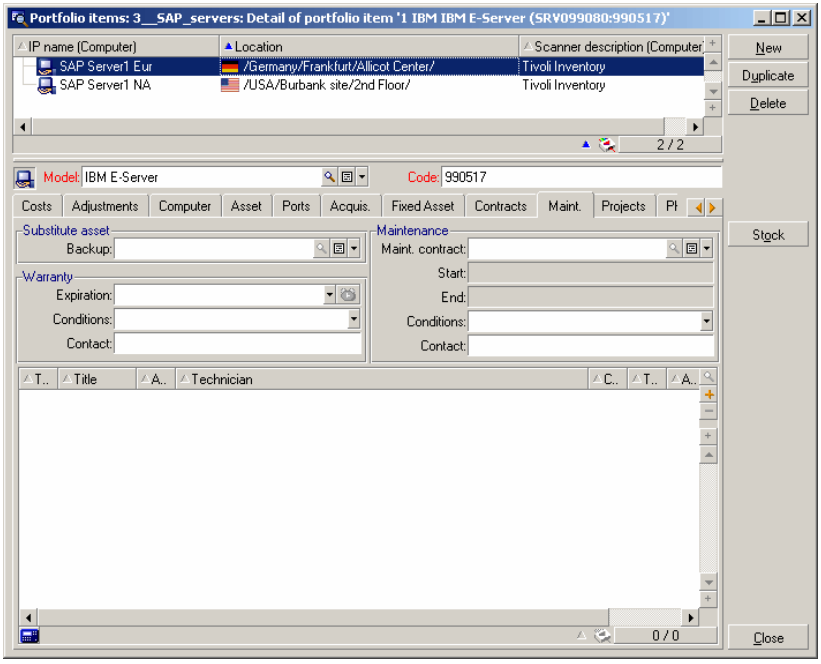
He will now compare the technical details of the two servers:

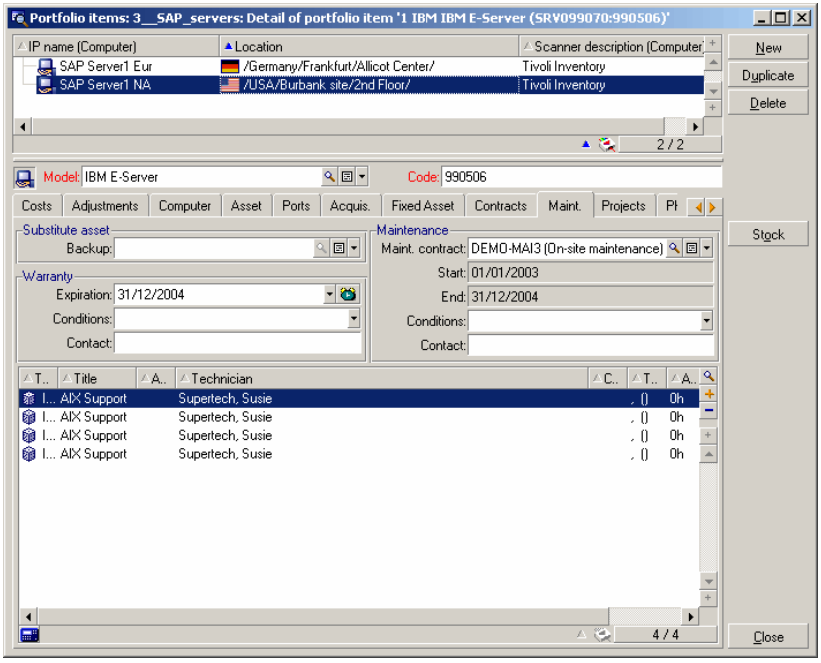




He notices that the German server has 4 CPUs whereas the US server has only one.

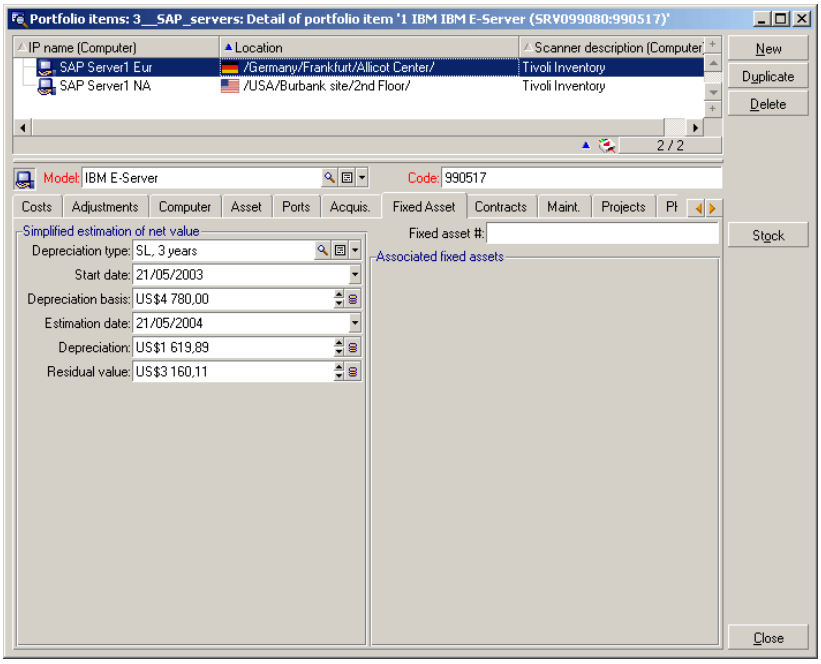
George Gilbert would like to compare the maintenance logs of the 2 servers:

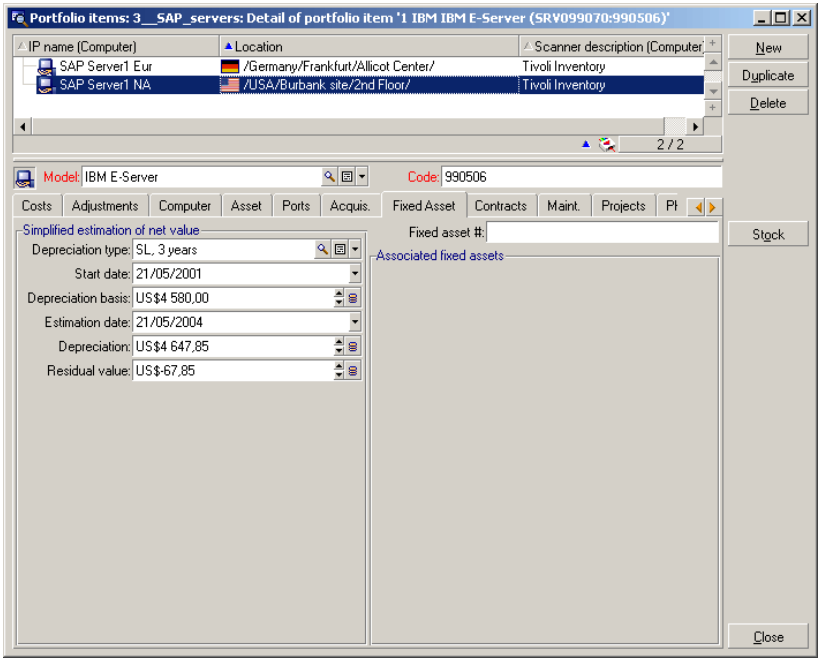




He notices that the German server has not required maintenance, whereas the US server has required several AIX service calls.

George Gilbert now would like information on the amortization status of the two servers:





He notices that the US service is fully amortized, whereas the German server is not yet.

All this information, obtained in a short amount of time, has allowed him to compare the two different solutions in terms of expenditure and he can now make an informed decision to consolidate on the German SAP server.

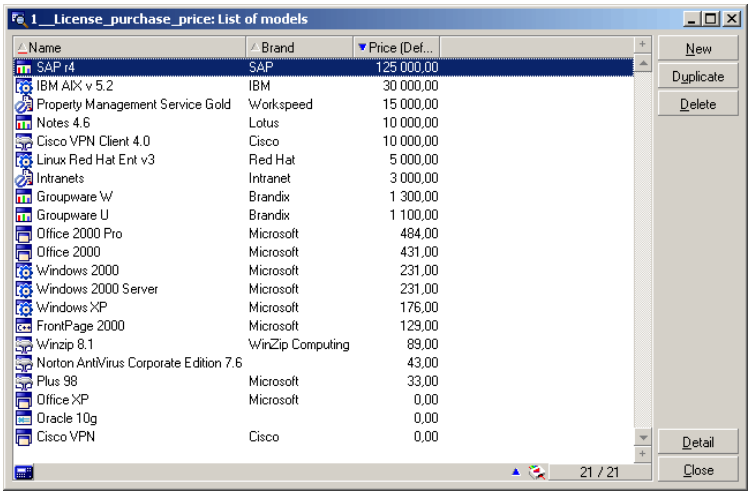
Optimizing software license expenses

George believes that since the merger, his company is likely over-spending on software licenses and he decides to investigate. He has decided to start by looking at his most expensive software.

He starts by searching for software the most expensive to buy.

He opens the list of license purchase prices using the shortcut **1. License purchase prices**:

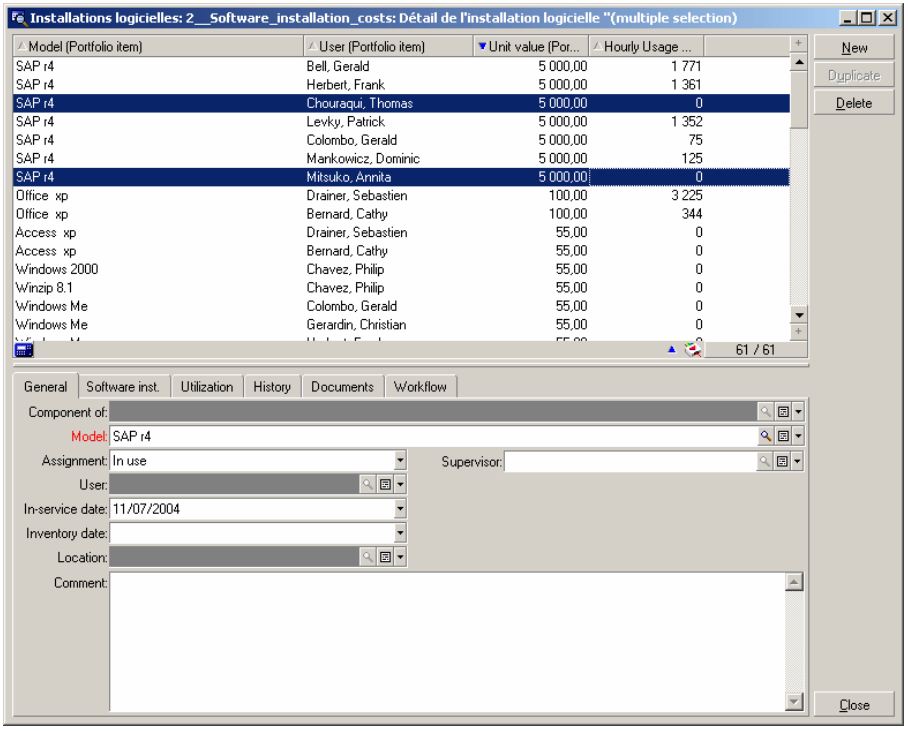
AssetCenter displays the following list of license purchase prices:



At first glance, he quickly identifies that SAP is by far the most expensive license. He therefore decides to drill down further. George starts by examining SAP per user costs.

He accesses the list of software installation costs using the shortcut **1. Software installation costs**:

AssetCenter displays the corresponding list:



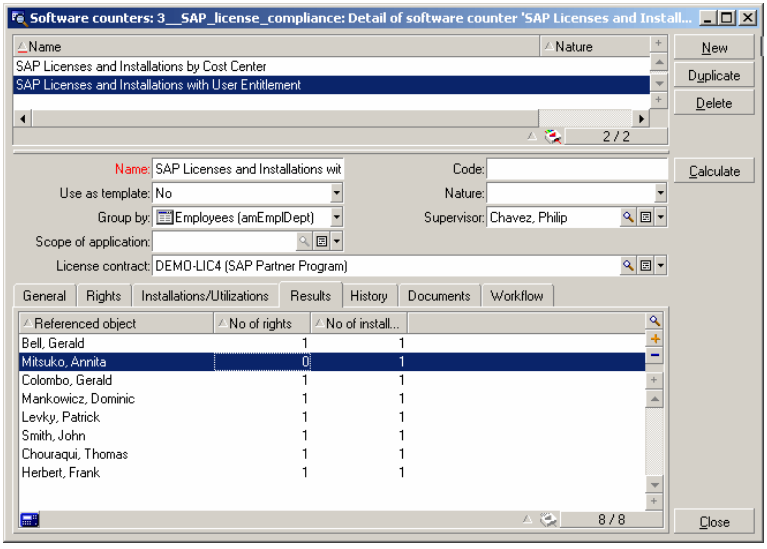
George confirms that SAP is very expensive to deploy on a per-user basis and that he should closely scrutinize who has access to it.

George notices that two people who have SAP installed are not using it (usage = 0). This presents a potential cost savings opportunity.

George moves on to see whether the company is contractually in compliance for the SAP licenses it has deployed.

First, George clicks on the **Rights** tab to review total number of rights versus number deployed. This should show that he is in compliance. Next he accesses the list of SAP software counters using the shortcut **3. SAP license compliance**:

AssetCenter displays the following list



He sees that Annita Mitsuko has SAP installed but is not actually entitled to one. Also, from the previous screen, George remembers that Annita is not using the product. Therefore, George can contact Annita directly and then reduce the

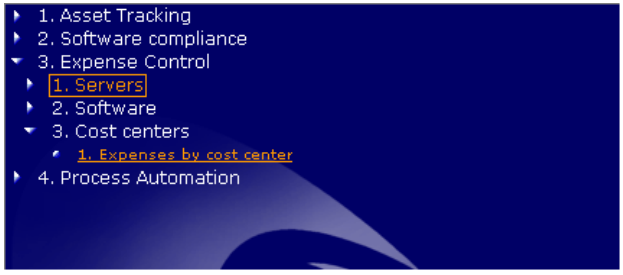
number of SAP licenses that the company needs to maintain, thus saving on future maintenance expenses related to the license.

In another example, Thomas Chouraki has an SAP license and is identified as being entitled to it, however, as he saw in the previous screen, Thomas has also not used SAP. Here again is another opportunity to either reassign the license or reduce the number of licenses required.

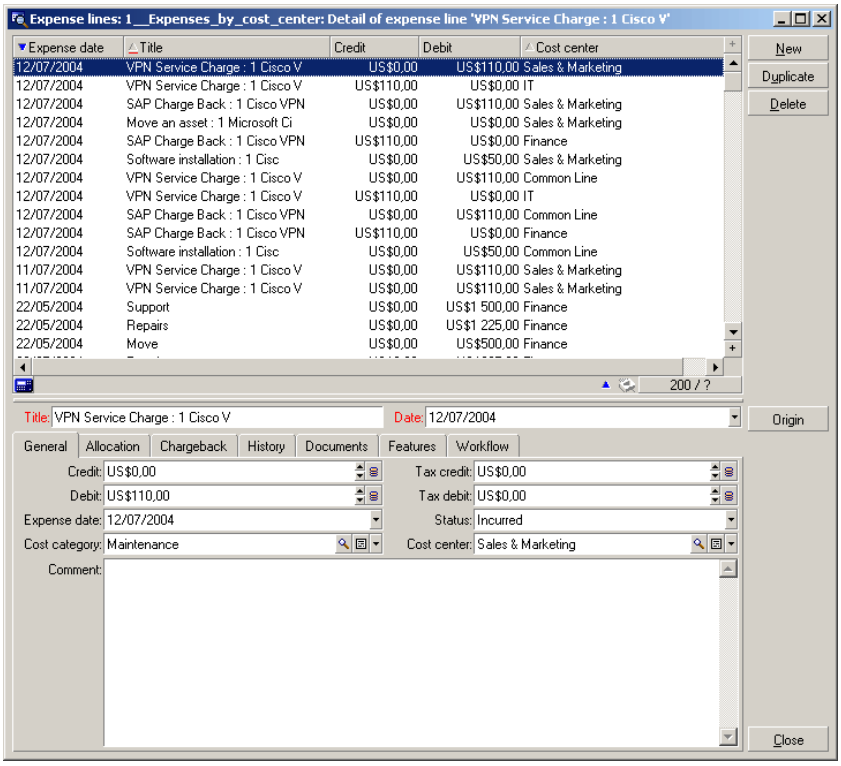
Analyzing expenses by cost center

As George is under pressure to identify other areas to reduce expenses, he has decided to review costs by department to determine if he can identify additional cost cutting opportunities.

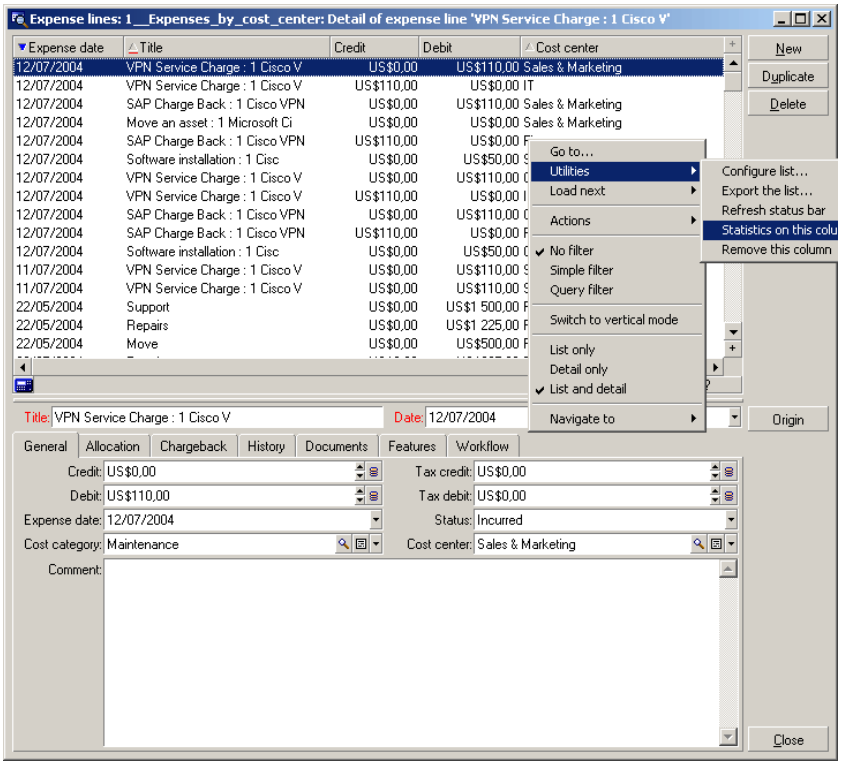
He accesses the list of expenses using the shortcut **1. Expenses by cost center**:



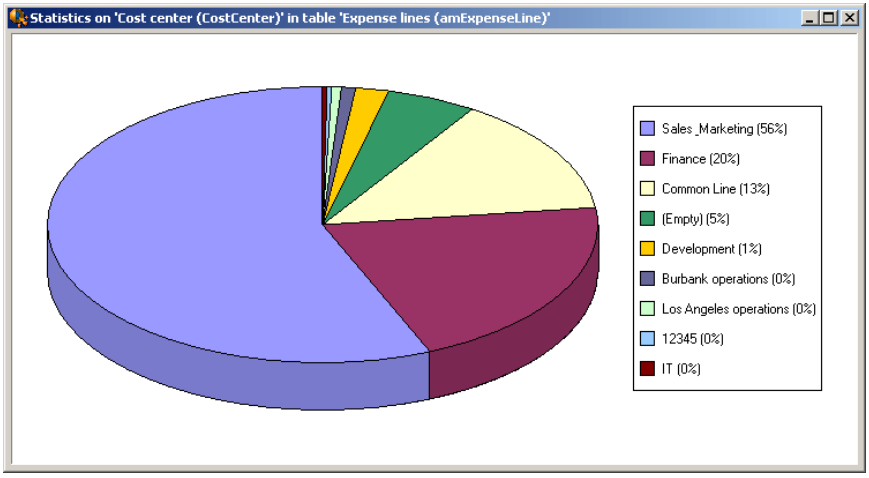
AssetCenter displays a list of expenses. Note the identification of departments and cost centers that are responsible for the incurred expenses:



George Gilbert right clicks the **Cost center** column, and then selects the **Utilities/ Statistics on this column** command from the shortcut menu:



AssetCenter displays a chart that shows expenses by cost center:



Immediately, George recognizes that the marketing department is generating a disproportionate percentage of IT expenses. George can now focus his future efforts on understanding why marketing is so expensive to support.

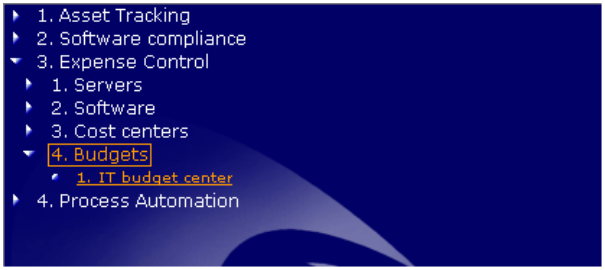
Tracking budget against actual

AssetCenter serves as IT's general ledger. With it, George can not only establish his operating budget but also compare actual expenses against budget. This helps to identify cost overruns and plan future courses of action. AssetCenter allows George to do the following:

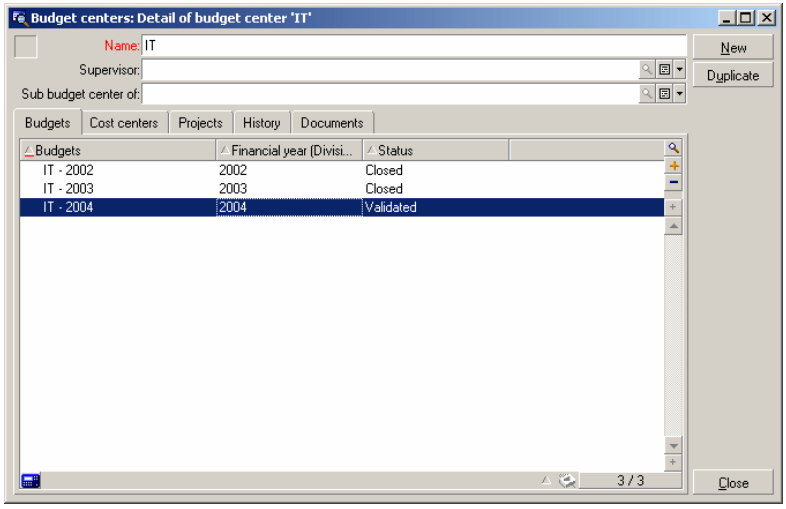
- Create a budget
- Define cost centers and types of costs to be incurred (cost categories)
- Record the types of costs incurred by cost center

Using this information, George has a real-time view of how IT is performing against budget.

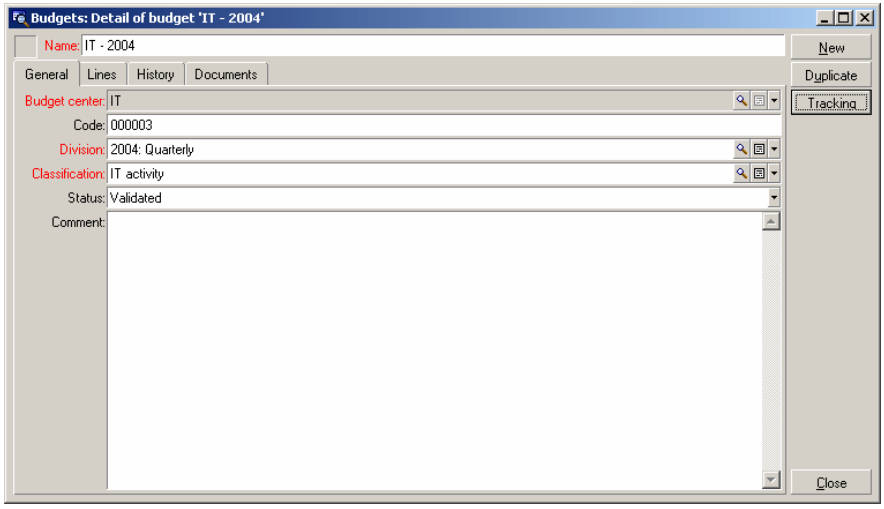
He accesses the list of expenses using the shortcut **1. IT budget center**:



AssetCenter displays the available budgets:

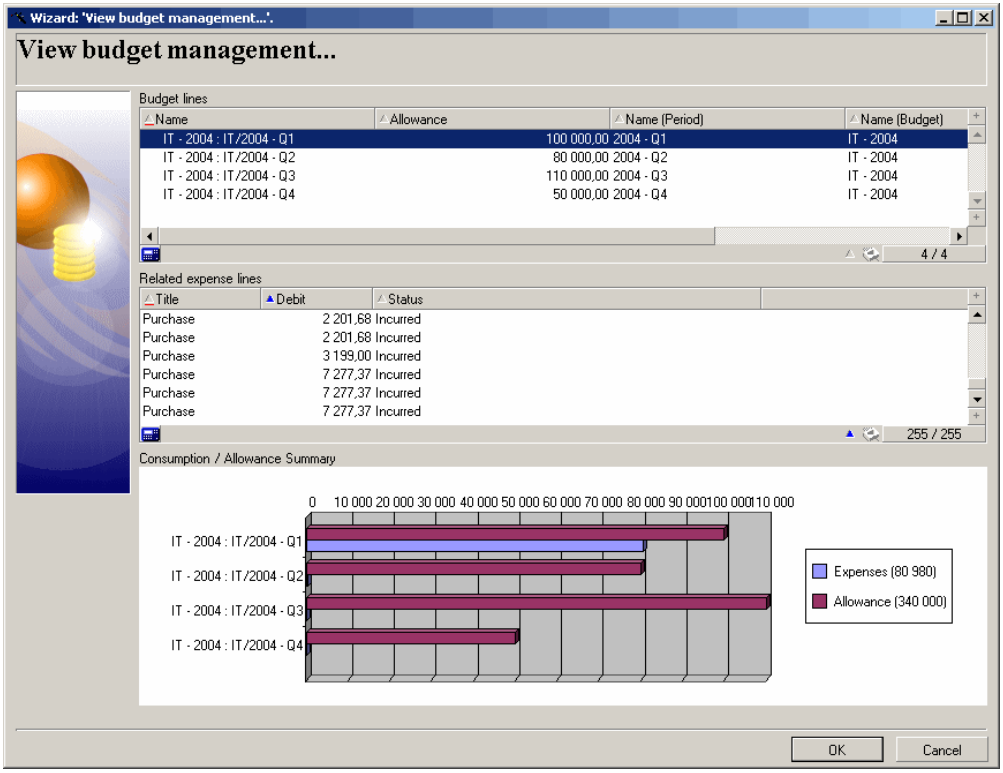


George wishes to review the current, 2004, budget.



In order to compare how IT is working against budget, George clicks the **Tracking** button.

AssetCenter displays a budget control wizard, which enables George to see whether IT is over or under budget.



APPENDIX A Going further

This guide has served as a sample of how to use AssetCenter to accomplish the most common asset management processes within the early stages of process maturity. By following the steps described in this document, organizations can reach a proactive level of process maturity. To schedule a demo or to learn more about the additional processes unlocked by Peregrine's **Process Automation** and **Asset Optimization** solutions, refer to the Peregrine contacts below.

Your contacts at Peregrine Systems

If you have questions or for additional information:

Matthew Schvimmer, Asset Management Senior Product-Marketing Manager (matthew.schvimmer@peregrine.com) or **Dennis Byrne**, Asset Management Senior Product Manager, dennis.byrne@peregrine.com

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AssetCenter compatibility matrix

For information on supported environments, refer to the Peregrine support site at **http://support.peregrine.com**.

Please contact Peregrine Systems for an identifier and a password.

Once you are logged on to the support site, you can browse the compatibility matrix pages via **Product Information/ Asset Management/ AssetCenter/ Compatibility Matrices**.

Information on the Peregrine Systems offering

The Peregrine Systems web site contains a wealth of information.

In particular, you will find product documentation, white papers, demonstrations, customer testimonials.

The address of the web site is **http://www.peregrine.com**.

Trying out AssetCenter by yourself

If you would prefer to install AssetCenter and work through the examples on your own, Peregrine is willing to accommodate under the terms of a non-disclosure agreement. Live demonstrations can be scheduled at any time.

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